

ORACLE

# Oracle Guided Learning

Job Aid for guide Adding New Contact (jgu8s01r)  
(qDcmWFg6S0+Oh0nRyU8+8w) (--)

<No description>

# Step 1

(694-1)

Click **Supplier Portal**

The screenshot shows the SCA NexGen-ERP dashboard. At the top, there is a status bar with the text "\*\*\*DEV2 Environment - Prod Refresh 10/12 (8:30 pm) \*\*\*\*". The dashboard header includes the SCA NexGen-ERP logo and navigation icons for home, full screen, notifications, and a user profile labeled "PM". The main content area features a greeting "Good afternoon, Paul McCann" and a navigation menu with "Contract Management", "Supplier Portal", "Configuration", and "Others". A tooltip is displayed over the "Supplier Portal" menu item, containing the text "Click **Supplier Portal**", a "Close" button, and a "Back" button. Below the navigation menu, there are "QUICK ACTIONS" (Search Contracts by Text, Manage Contracts, Show More) and "APPS" (Contracts). The "Things to Finish" section shows two cards: "Assigned to Me" with a count of 0 and "Created by Me" with a count of 0. A notification card on the right states "You have no open notifications." with a notification icon.



# Step 2

(152-2)

Click **Supplier Portal**

The screenshot shows the SCA NexGen-ERP dashboard. At the top, there is a navigation bar with the SCA NexGen-ERP logo and user information: "Good afternoon, Paul McCartney". Below the navigation bar are menu items: "Contract Management", "Supplier Portal", "Procurement", "My Enterprise", "Tools", "Configuration", and "Others".

In the "APPS" section, there is a "Supplier Portal" icon. A tooltip is displayed over this icon with the text "Click **Supplier Portal**". The tooltip has two buttons: "Close" and "Back".

Below the apps section is a "Things to Finish" section with two cards:
 

- "Assigned to Me" with a count of 0.
- "Created by Me" with a count of 0.

At the bottom right, there is a notification area with a bell icon and the text "You have no open notifications."



# Step 3

(707-3)

Click **Manage Profile**

**Note: Any edits made to company information should be fully submitted for SCA-review or canceled as any edits (i.e., change requests) left in draft status will prevent payments from being fully processed and paid.**

The screenshot shows the 'Supplier Portal' interface. On the left is a navigation menu with categories like 'Manage Orders', 'Agreements', 'Channel Programs', 'Shipments', 'Work Confirmations', 'Consigned Inventory', 'Invoices and Payments', 'Qualifications', and 'Company Profile'. The 'Company Profile' section has 'Manage Profile' selected. The main content area includes sections for 'Requiring Attention', 'Recent Activity', 'Transaction Reports', and 'Supplier News'. A modal dialog box is overlaid on the 'Supplier News' section, containing the text: 'Click Manage Profile. Note: Any edits made to company information should be fully submitted for SCA-review or canceled as any edits (i.e., change requests) left in draft status will prevent payments from being fully processed and paid.' The dialog has 'Close' and 'Back' buttons.



# Step 4

(593-4)

Click Edit

The screenshot shows the SCA NexGen-ERP interface for a 'Company Profile'. At the top, there is a navigation bar with the SCA logo and 'NexGen-ERP' text. Below this, the page title is 'Company Profile' with a help icon. A notification banner states: 'There are profile changes that aren't submitted. You must edit the changes to continue.' In the top right corner, there are icons for home, list, notifications, and a user profile 'PM', along with buttons for 'Cancel Change Request', 'Edit', and 'Done'. The main content area includes a summary of the last change request: 'Last Change Request 14005', 'Requested By McCartney Paul', and 'Request Date 11/4/28'. Below this is a horizontal menu with tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Payments' tab is currently selected, and within it, the 'Bank Accounts' sub-tab is active. A tooltip with the text 'Click Edit' and buttons for 'Close' and 'Back' is positioned over the 'Edit' button in the top right.



# Step 5

(768-5)

Click Yes

The screenshot shows the Oracle NexGen-ERP interface. At the top, the browser address bar displays "DEV2-Environment - Prod Refresh 10/12 (8:30 pm) \*\*\*\*\*". The application header includes the "Sca NexGen-ERP" logo and navigation icons for home, messages, notifications, and a user profile icon labeled "PM". The main heading is "Company Profile" with a help icon. Below this, a notification states: "There is a profile change request pending approval. You may edit to make additional changes." The page content is divided into sections: "Last Change Request" (14065), "Request Status" (Pending Approval), "Requested By" (McCartney, Paul), and "Request Date" (11/4/23). A "Change Description" field contains the text "Add new contact/user to company profile". A navigation menu includes "Organization Details", "Tax Identifiers", "Addresses", "Contacts", "Payments", "Business Classifications", and "Products and Services". Under "Payments", there are sub-sections for "Payment Methods" and "Bank Accounts". A warning dialog box is open in the center, with the text: "Warning POZ:2130389 There is currently a profile change request pending approval. Do you want to withdraw it to make additional changes?". The dialog has a "Yes" button and a "Close" button. A secondary dialog box is also present, containing the text "Click Yes" and a "Back" button.



# Step 6

(571-6)

Enter **Change Description** (Ex: Add new contact/user to company profile)

The screenshot shows the SCA NexGen-ERP interface. At the top, there is a navigation bar with the SCA logo and 'NexGen-ERP' text. Below this is a breadcrumb trail: Organization Details > Tax Identifiers > Addresses > Contacts > **Payments** > Business Classifications > Products and Services. The main content area is titled 'Edit Profile Change Request:'. On the right side of this area, there are three buttons: 'Cancel Change Request', 'Review Changes', and 'Save' (with a 'Cancel' button next to it). A modal dialog box is open in the center, titled 'Enter Change Description (Ex: Add new contact/user to company profile)'. The dialog contains a text input field with the placeholder text 'Add new contact/user to company profile'. Below the input field are three buttons: 'Close', 'Back', and 'Next'. The background page shows a 'Change Description' label and a text area, and below that, a sub-section for 'Payment Methods' with a 'Bank Accounts' tab selected.



# Step 7

(782-7)

Click **Contacts** tab

\*\*\*DEV2 Environment - Prod Refresh 10/12 (8:30 pm) \*\*\*

**SCA NexGen-ERP**

Edit Profile Change Request:

Cancel Change Request Review Changes Save Cancel

Change Description: Add new contact/user to company profile

Organization Details Tax Identifiers Addresses **Contacts**

Click Contacts tab

Actions View Format + - Status Acti Close Back

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
McCartney, Paul	VP	penycsca@gmail.com		✓	✓	Active
Smith, Jane	Account Manager	jsmith@noemail.com				Active

Columns Hidden 7



# Step 8

(979-8)

Click + (plus icon) to add a new contact

Note: To edit, click the pencil icon.

The screenshot shows the SCA NexGen-ERP interface. At the top, there is a navigation bar with the SCA NexGen-ERP logo and a user profile icon labeled 'PM'. Below the navigation bar, there are buttons for 'Cancel Change Request', 'Review Changes', 'Save', and 'Cancel'. The main content area is titled 'Edit Profile Change Request:'. A modal dialog is open in the center, with the title 'Change Description' and the text 'Add new contact/user to company profile.' The dialog contains the instruction 'Click + (plus icon) to add a new contact' and 'Note: To edit, click the pencil icon.' There are 'Close' and 'Back' buttons at the bottom of the dialog. In the background, a table lists contact information. The table has columns for Name, Job Title, Email, Phone, Administrative Contact, User Account, and Status. One contact is listed: McCartney, Paul, with Job Title 'VP', Email 'ponycsca@gmail.com', and Status 'Active'. There are also 'Organization Details', 'Tax Identifiers', and 'Address' tabs visible.

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
McCartney, Paul	VP	ponycsca@gmail.com		✓	✓	Active



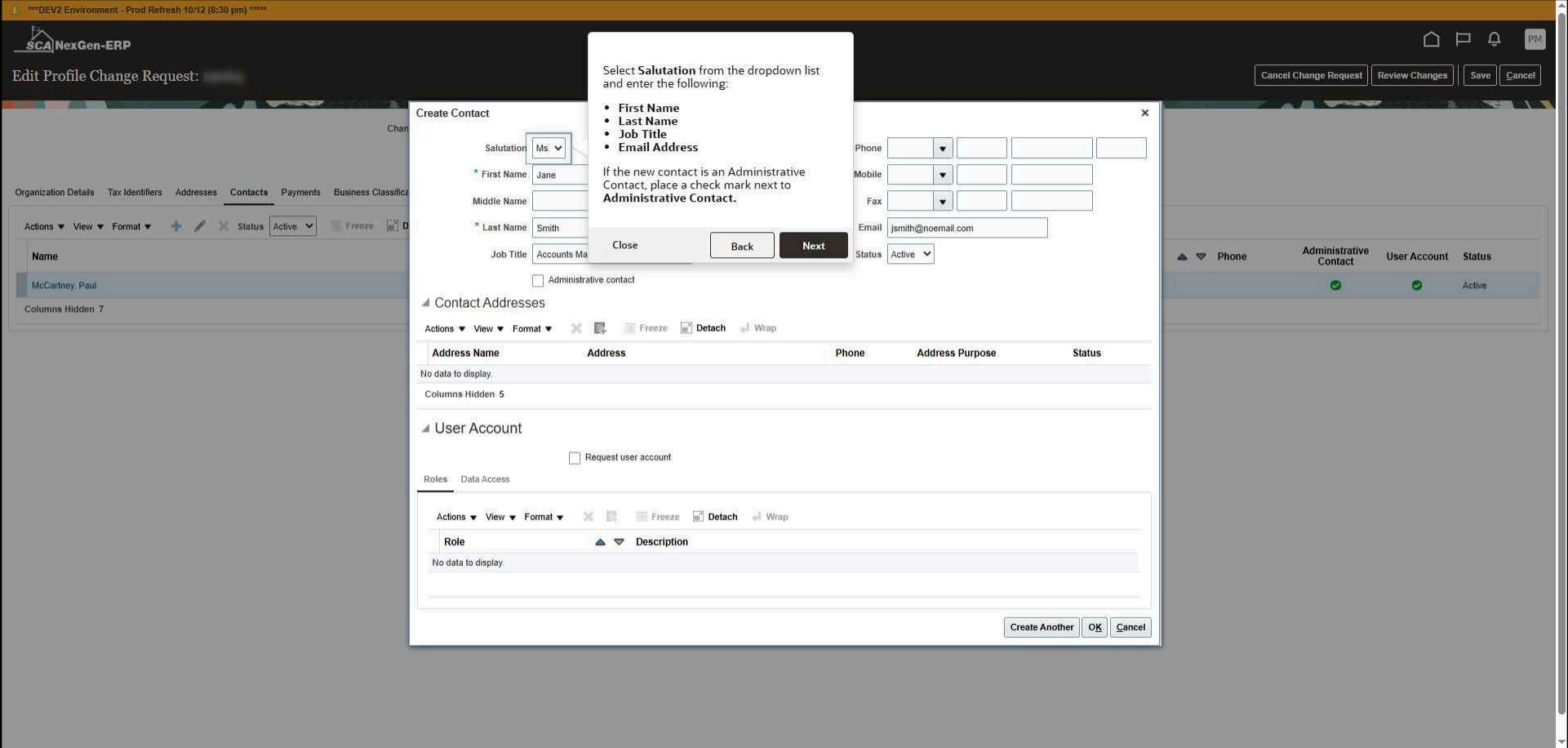
# Step 9

(495-17)

Select **Salutation** from the dropdown list and enter the following:

- **First Name**
- **Last Name**
- **Job Title**
- **Email Address**

If the new contact is an Administrative Contact, place a check mark next to **Administrative Contact**.



# Step 10

(472-18)

Place a check mark in **Request user account box**

Note: By placing a check mark, a user profile will be created for the new contact which will provide access to the Supplier Portal.

The screenshot shows the 'Create Contact' dialog box in the SCA NexGen-ERP system. The dialog is open over the 'Edit Profile Change Request' page. The 'Create Contact' form includes fields for Salutation (Ms.), First Name (Jane), Middle Name, Last Name (Smith), Job Title (Accounts Manager), Phone, Mobile, Fax, Email (jsmith@noemail.com), and Status (Active). There is an unchecked checkbox for 'Administrative contact'. Below these fields is the 'Contact Addresses' section, which is currently empty. The 'User Account' section has a checked checkbox for 'Request user account'. Below this is a table of roles:

Role	Description
SCA Supplier Portal Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...
SCA Supplier Portal Inquiry	Role provides Inquiry access to the supplier's Invoices and Payment
SCA Supplier Portal Specialist	Manages Invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invol...

A callout box points to the 'Request user account' checkbox with the following text: 'Place a check mark in Request user account box. Note: By placing a check mark, a user profile will be created for the new contact which will provide access to the Supplier Portal.' The callout box has 'Close' and 'Back' buttons. At the bottom of the dialog are 'Create Another', 'OK', and 'Cancel' buttons.



# Step 11

(856-19)

Click **Actions** dropdown to remove or add to user's role

The screenshot shows the SCA NexGen-ERP interface. A 'Create Contact' dialog box is open, displaying fields for personal information (Salutation, First Name, Middle Name, Last Name, Job Title, Phone, Mobile, Fax, Email, Status) and contact details (Administrative contact, Contact Addresses, User Account). The 'User Account' section is expanded, showing a table of roles. The 'Actions' dropdown menu is open over the 'Role' column of this table.

**Administrative contact:**

**Contact Addresses:** No data to display. Columns Hidden: 5

**User Account:**  Default user account

Role	Description
SCA Supplier F...	r the supplier company. Primary tasks include updating supplier profile information and requ...
SCA Supplier Portal Inquiry	Role provides Inquiry access to the supplier's Invoices and Payment
SCA Supplier Portal Specialist	Manages Invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invol...

**Actions dropdown:** Click Actions dropdown to remove or add to user's role. Buttons: Close, Back.

**Dialog Box Buttons:** Create Another, OK, Cancel.



# Step 12

(874-20)

Click OK

\*\*\*DEV2 Environment - Prod Refresh 10/12 (8:30 pm) \*\*\*\*

SCA NexGen-ERP

Edit Profile Change Request:

Cancel Change Request Review Changes Save Cancel

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classification

Actions View Format + ✕ Status Active Freeze

**Name**

McCartney, Paul

Columns Hidden 7

**Create Contact**

Salutation Ms

\* First Name Jane

Middle Name

\* Last Name Smith

Job Title Accounts Manager

Administrative contact

Phone

Mobile

Fax

Email jsmith@noemail.com

Status Active

**Contact Addresses**

Address Name Address Phone Address Purpose Status

No data to display.

Columns Hidden 5

**User Account**

Request user account

Roles Data Access

Role	Description
SCA Supplier Portal Administrator	Manages the profile information for the supplier company. Primary tasks include updating supplier profile information and requ...
SCA Supplier Portal Inquiry	Role provides Inquiry access to the supplier's Invoices and Payment
SCA Supplier Portal Specialist	Manages Invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invol...

Create Another OK

Phone Administrative Contact User Account Status

Active

Click OK

Close Back



# Step 13

(992-21)

Click Review Changes

\*\*\*DEV2 Environment - Prod Refresh 10/12 (8:30 pm) \*\*\*

SCA NexGen-ERP

Edit Profile Change Request: Cancel Change Request Review Changes Save Cancel

Change Description: Add new contact/user to company profile

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
McCartney, Paul	VP	perycsca@gmail.com		✓	✓	Active
Smith, Jane	Account Manager	jsmith@noemail.com				Active

Columns Hidden 7

Click Review Changes

Close Back



# Step 14

(238-22)

Click **Submit**

\*\*\*DEV2 Environment - Prod Refresh 10/12 (8:30 pm) \*\*\*

**SCA NexGen-ERP** Home, PM, Edit, Submit, Cancel

Review Changes

Change Description: Add new contactuser to company profile

Contacts

View Format Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status	Details
+ Smith, Jane	Account Manager	jsmith@noemail.com				Active	

Columns Hidden 7

Click **Submit**

Close Back



# Step 15

(556-23)

Click **OK**

SCA Finance team will review the submitted change request. The submitter will be notified if there's any questions.

The screenshot shows the SCA NexGen-ERP interface. At the top, there's a navigation bar with the SCA logo and 'NexGen-ERP'. Below it, the page title is 'Company Profile'. A notification banner states: 'There is a profile change request pending approval. You may edit to make additional changes.' The main content area shows details for a change request: 'Last Change Request: 19064', 'Request Status: Pending Approval', 'Requested By: McCartney, Paul', and 'Request Date: 11/14/25'. The 'Change Description' is 'Add new contact/user to company profile.' Below this are tabs for 'Organization Details', 'Tax Identifiers', 'Addresses', 'Contacts', 'Payments', 'Business Classifications', and 'Products and Services'. The 'Payments' tab is active, showing sub-tabs for 'Payment Methods' and 'Bank Accounts'. A confirmation dialog box is open in the center, with the text: 'Confirmation: Your profile change request 19064 was submitted for approval.' and an 'OK' button. A larger callout box points to the 'OK' button, containing the text: 'Click OK: SCA Finance team will review the submitted change request. The submitter will be notified if there's any questions.' with 'Close' and 'Back' buttons at the bottom.



# Step 16

(721-16)

This completes the guide.



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