



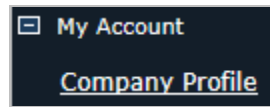
# Supplier: Managing your Trading Profile

You can administer your system users by adding and removing them as appropriate to ensure Guide Dogs stay up to speed with whom, in your company, we should be trading with. You can also maintain all other aspects of your trading relationship so as to keep Guide Dogs up to date. Your product catalogue can also be uploaded and maintained. See [Uploading your Product Catalogue](#)

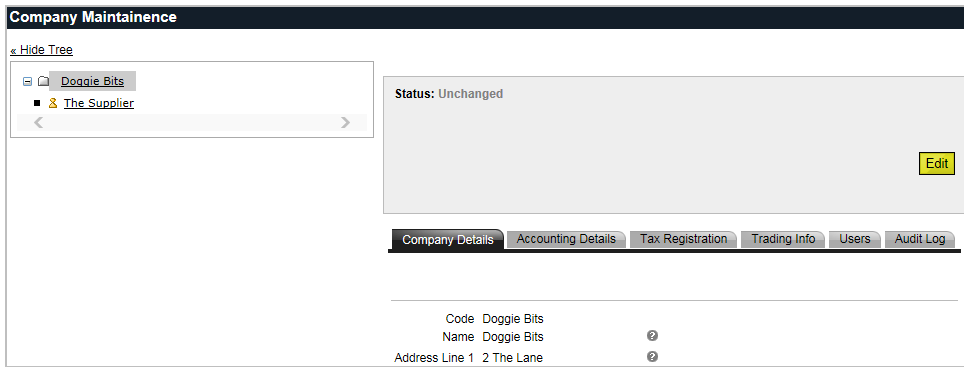
## Managing your Trading Profile

When editing the company Profile it is locked out for editing by any users, including Guide dogs. The editing of certain attributes is subject to Guide Dogs approval

1. From the Navigation pane, *click My Account > Company Profile*

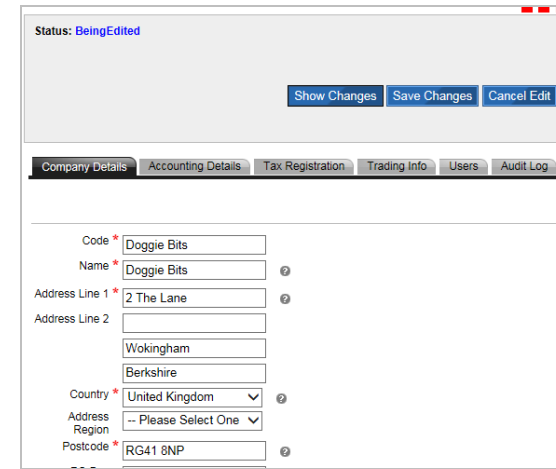


2. The Company Maintenance screen will appear, *click Edit*



## Maintaining your Company and Contact Details

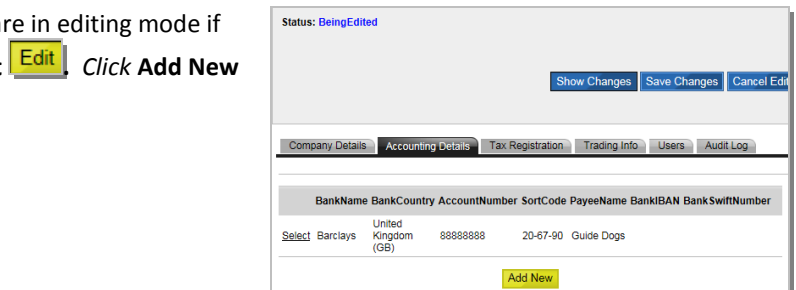
Your company details can be located on the company Details tab, this is the default view when accessing the company profile




## Setting your Accounting details

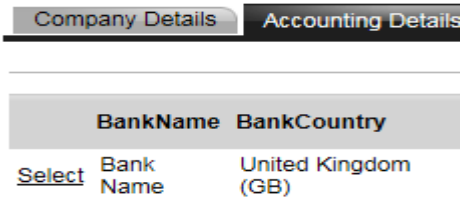
All accounting details can be found on the Accounting Details Tab. Please note that you can only have one bank account registered.

1. Ensure you are in editing mode if not *click Edit*, *Click Add New*



## Amending your Bank Details

As above click **Edit**  then click on select the left hand side of the line



Company Details Accounting Details

	BankName	BankCountry
Select	Bank Name	United Kingdom (GB)

Click on the yellow Edit button **Edit** 

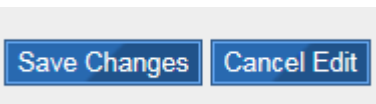


Bank \*  ?

Bank \*  ?

Account Number  ?


Sort Code  ?

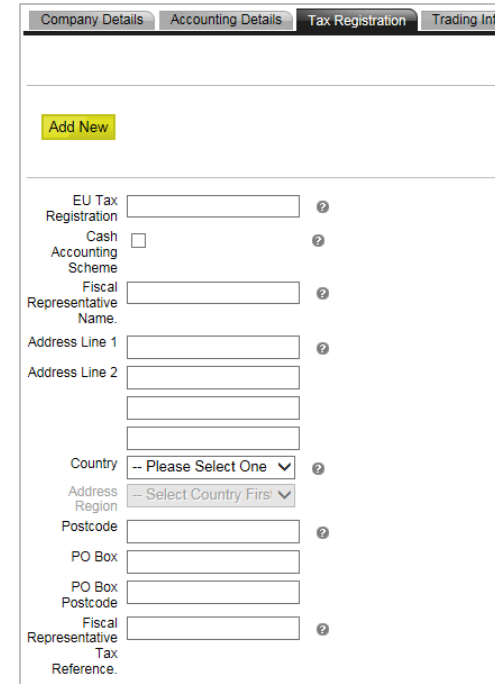


Click on Save Changes

## Setting your Tax Details

The registering of tax details in the portal can also facilitate international trading, as it is possible to enter tax registration details for each country where you are registered, if this applies. To add new Tax information

1. Ensure you are in editing mode if not *click* **Edit** 



Company Details Accounting Details Tax Registration Trading Info

EU Tax Registration  ?

Cash Accounting Scheme  ?

Fiscal Representative Name  ?

Address Line 1  ?

Address Line 2

Country  ?


Address Region  ?

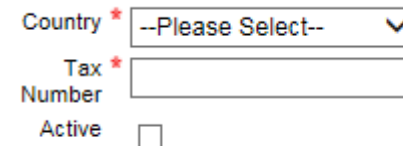
Postcode  ?

PO Box

PO Box Postcode

Fiscal Representative Tax Reference  ?

2. Click the **Tax Registration** tab and then click 
3. Enter the required information into the Country by selecting from the dropdown, enter the tax number starting GB and ensure you check the small box marked Active to make the VAT number active in the system



Country \*  ?

Tax \*

Active  ?

4. Ensure you save your changes

## Publishing your Trading Information

General trading information can be checked by choosing the Trading Info tab. All Terms & Conditions that you have accepted also appear in here

The screenshot shows the 'Trading Info' tab selected. It displays two sections: 'Trading Partners' and 'Terms And Conditions'. The 'Trading Partners' section shows 'Guide Dogs'. The 'Terms And Conditions' section shows a table of accepted terms.

Name	Language	Version	Document	Accepted	Accepted Date	Accepting User
Trading Terms and Conditions (Guide Dogs)	English (UK)	1.0	<a href="#">Download</a>	Yes	06/05/2015 12:58	The Supplier

Last User Login: 06/05/2015 14:44 (The Supplier)  
[Go To Terms and Conditions Administration](#)

2. Complete the Details screen with the required information. **Note:** All fields marked with a red \* are mandatory

5. Click **Save Changes** to save your changes, or **Cancel Edit** to remove changes

## Assigning Portal Users

Initially you are granted a user account to access the portal. Upon successful approval, you are able to set up and maintain further users

The screenshot shows the 'Users' tab selected. It features a search bar with a dropdown menu set to 'Name contains', a search button, and a filter bar with letters A-Z. Below the filter bar, it shows 'Items per page: 20' and '1 Results'. A 'New User' button is visible. The user list shows 'The Supplier'.

1. Click on the **Users** tab, click **New User**

<b>Security Policy:</b>	Click on the down arrow and from the drop-down menu select Simple
<b>User Name:</b>	Enter a login name
<b>Password:</b>	Enter an initial password, on login the user will be requested to change the password
<b>Email Address:</b>	Enter the users email address
<b>Native Currency:</b>	From the drop-down menu select GBP-Pound Sterling

The screenshot shows a navigation menu with tabs: Company Details, Accounting Details, Tax Registration, Trading Info, Users, and Audit Log. Below the menu is a search bar with the text "Search by: Name contains" and a "Search" button. Underneath is a filter bar with letters A-Z. Below that, it says "Items per page: 20" and "2 Results." with a "New User" button. The list of users shows two entries: "Freddie Bloggs" and "The Supplier".

The screenshot shows the "User Details" form with the "Contact" tab selected. The form contains the following fields: Title, First Name (Freddie), Middle Name, Surname (Bloggs), Description, Security Policy (Simple), Username Requirements (Minimum length: 3; Maximum length: 30), Password Requirements (Minimum length: 5), User Name (.bloggs@doggiebits.co.uk), New Password (two masked fields), User Locked Out (checkbox), Email Address (.bloggs@doggiebits.co.uk), and Native Currency (GBP - Pound sterling). Each field has a help icon (question mark) to its right.

## Getting Help

Please contact Guide Dogs Procurement Team on 0118 9835555 or email [web3.procurement@guidedogs.org.uk](mailto:web3.procurement@guidedogs.org.uk)

3. Click on the **Contact** tab, to enter any contact information
4. Click **Save Changes** [Save Changes](#) to Save the new user, or **Cancel Edit** [Cancel Edit](#) to remove changes. The new user is added