

# How to Update Profile





Adding Roles

# Updating the company's profile can only be done by the designated Profile Manager

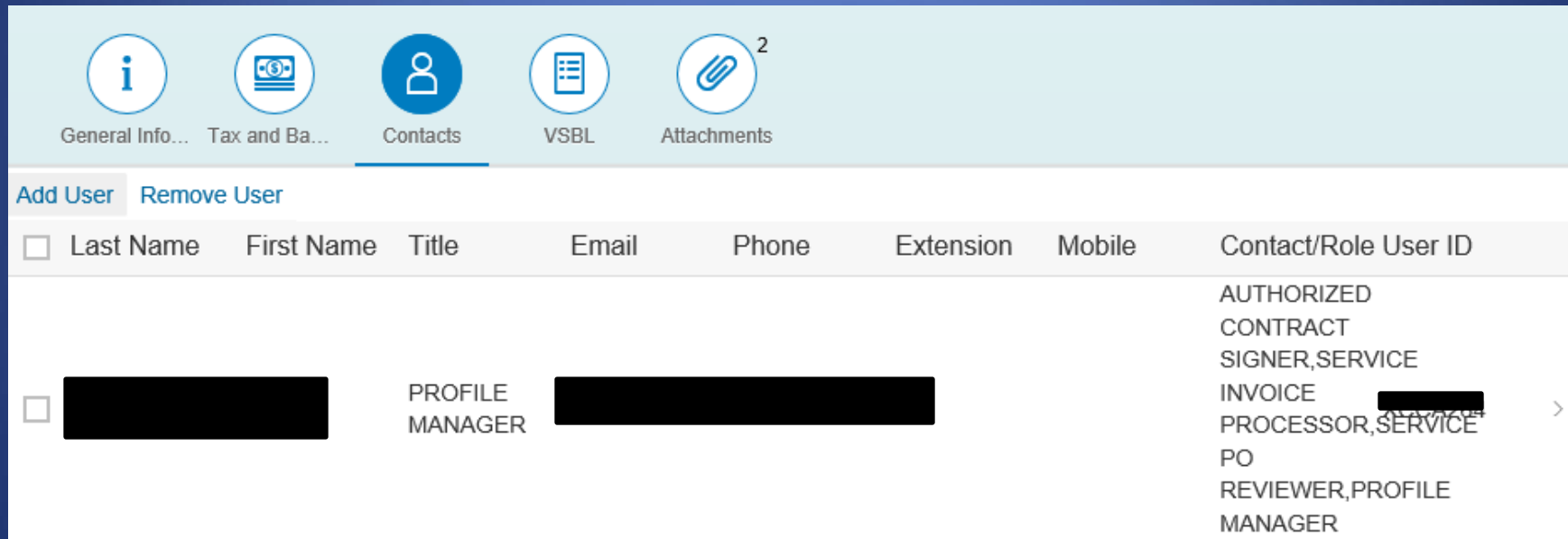
- If there is no profile manager, contact 402-544-0025

When logged in as Profile Manager, the Update Profile Tab will be present in the Create/Request Section on the SourceHub home screen

Create / Request

<p>Create and Subm... New, Rejected &amp; Mo...</p> <p> 239 Pending</p>	<p>Create Mobile SES Submit Daily (DWR)</p> <p></p>	<p>Request Retentio... Notarized Request</p> <p></p>	<p>Update Profile Users, Location &amp; W-9</p> <p></p>
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# Contacts allows edit of authorized contacts as well as Roles



The screenshot displays a software interface with a navigation bar at the top containing five icons: 'General Info...', 'Tax and Ba...', 'Contacts' (selected), 'VSBL', and 'Attachments'. Below the navigation bar are two buttons: 'Add User' and 'Remove User'. A table with the following columns is shown: 'Last Name', 'First Name', 'Title', 'Email', 'Phone', 'Extension', 'Mobile', and 'Contact/Role User ID'. One row is visible, with several fields redacted by black boxes. The 'Contact/Role User ID' column lists several roles: AUTHORIZED, CONTRACT SIGNER, SERVICE INVOICE PROCESSOR, SERVICE PO REVIEWER, and PROFILE MANAGER.

<input type="checkbox"/>	Last Name	First Name	Title	Email	Phone	Extension	Mobile	Contact/Role User ID
<input type="checkbox"/>	[REDACTED]	[REDACTED]	PROFILE MANAGER	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	AUTHORIZED CONTRACT SIGNER, SERVICE INVOICE PROCESSOR, SERVICE PO REVIEWER, PROFILE MANAGER

Select a name to edit their info and Roles. Select “Add Roles” to add new roles to the user

 Edit User

\*First Name:

\*Last Name:

\*Title:

\*Email:

\*Phone:


Extension:


Mobile:


Fax:

Relate User to Ordering Address:

+ Add Roles - Provides access the system

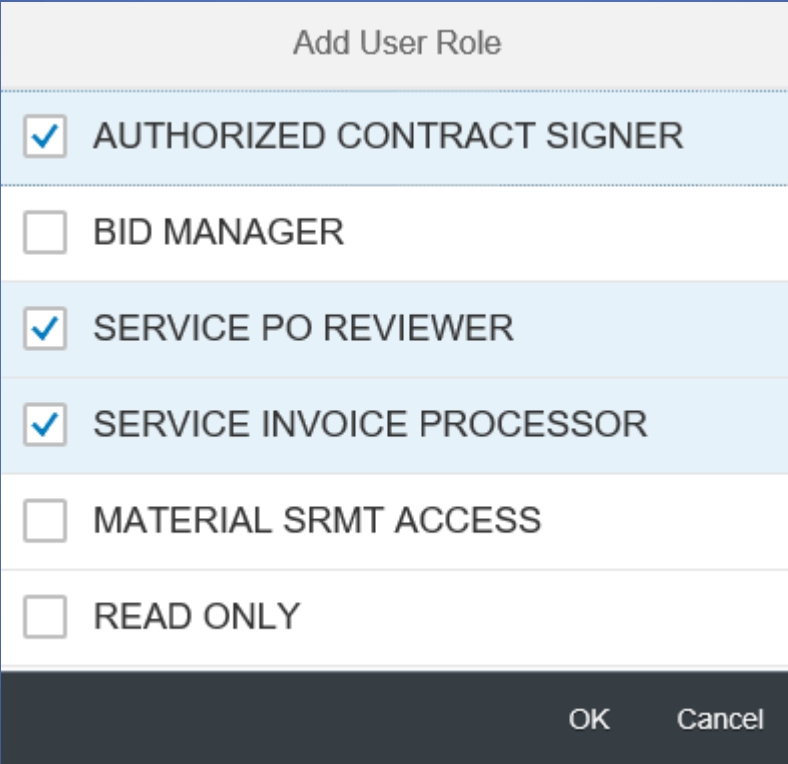
 AUTHORIZED CONTRACT SIGNER

 SERVICE PO REVIEWER

 SERVICE INVOICE PROCESSOR

+ Add Contacts - No access to system

After selecting “Add Roles”, a pop-up box will show up. Select the appropriate roles to add






The image shows a dialog box titled "Add User Role" with a list of roles and checkboxes. The roles are: AUTHORIZED CONTRACT SIGNER (checked), BID MANAGER (unchecked), SERVICE PO REVIEWER (checked), SERVICE INVOICE PROCESSOR (checked), MATERIAL SRMT ACCESS (unchecked), and READ ONLY (unchecked). At the bottom right, there are "OK" and "Cancel" buttons.

Role	Selected
AUTHORIZED CONTRACT SIGNER	Yes
BID MANAGER	No
SERVICE PO REVIEWER	Yes
SERVICE INVOICE PROCESSOR	Yes
MATERIAL SRMT ACCESS	No
READ ONLY	No

Click “OK” when finished

# Click the Green “Update” button to save all updates

+ Add Roles - Provides access the system

	AUTHORIZED CONTRACT SIGNER
	SERVICE PO REVIEWER
	SERVICE INVOICE PROCESSOR

+ Add Contacts - No access to system