LOUISVILLE REGIONAL AIRPORT AUTHORITY (LRAA)

MAINTAINING VENDOR INFORMATION THROUGH THE VENDOR PORTAL

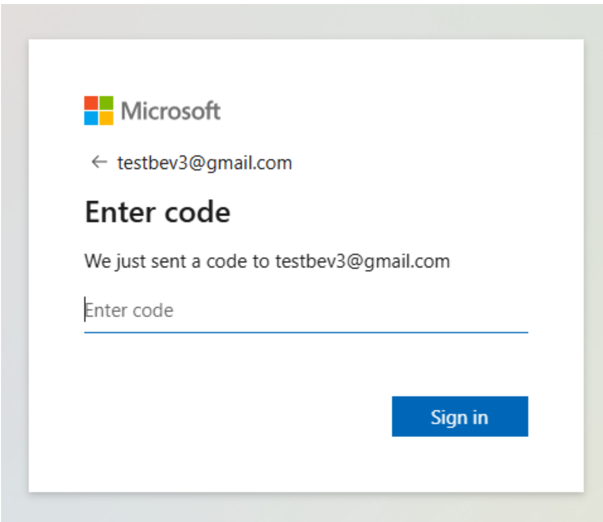
This document provides instructions and information about updating vendor information through the LRAA Vendor Portal. To utilize these instructions, you must have registered as a user in the LRAA Vendor Portal or have been added as a user by your company's registered user. If you have any questions contact LRAAVendor@flylouisville.com.

Instructions for initial registration can be found in **Vendor Portal Registration** PDF**.**

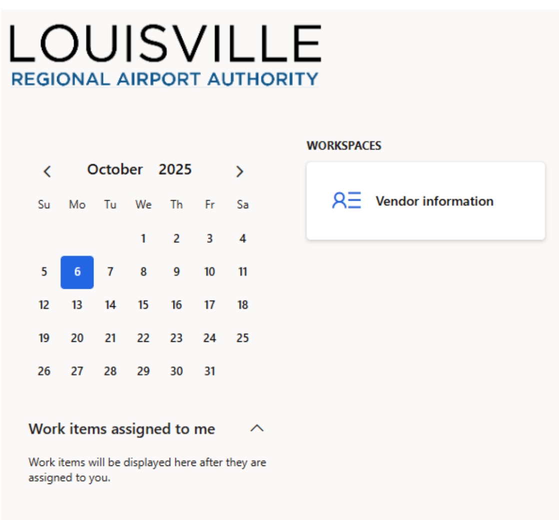
Maintain Vendor Information in Portal

Access Path:	https://flylouisville.operations.dynamics.com/.

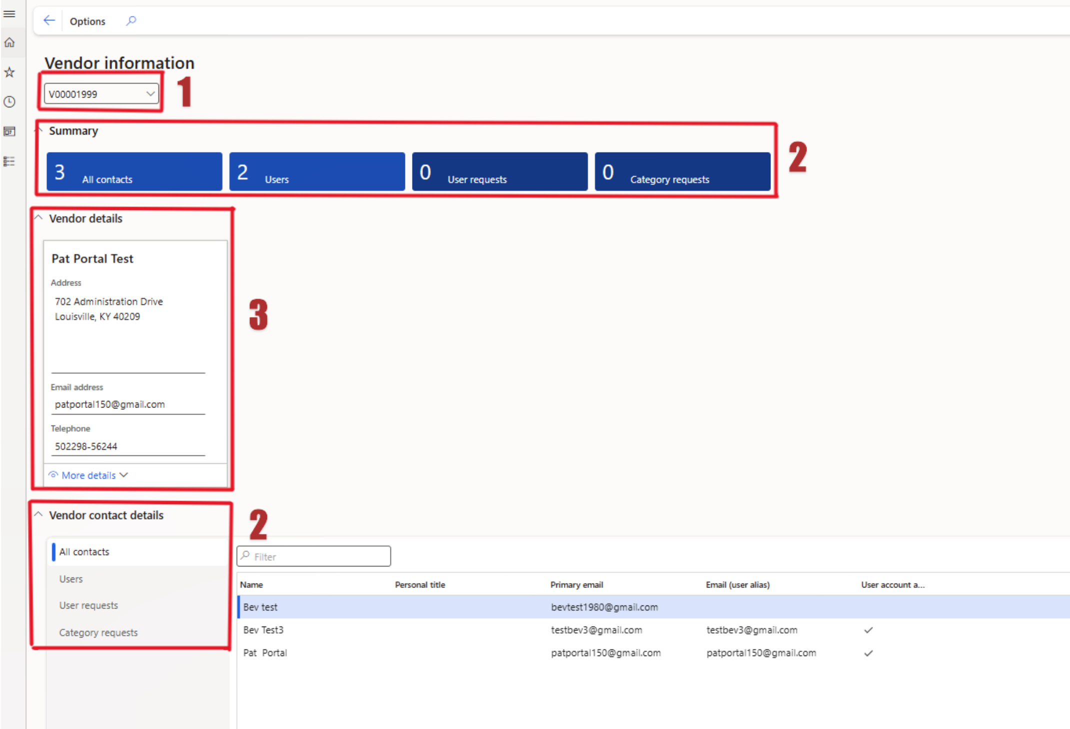
Access the LRAA Vendor Portal at the link above. You will be asked to enter a security code that will be emailed to the addressed used to log into the system.



If directed to the home screen, select the Vendor **Information** tile.

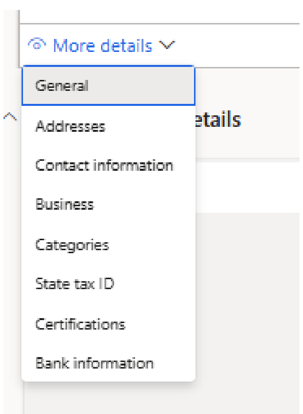


Within the **Vendor information** workspace, the vendor organization's Dynamics account number can be referenced in the top left-hand side of the form (1). The workspace lists tiles across the top and down the left side showing general contact and user information (2). The Vendor details section is where changes can be made to vendor information (3).

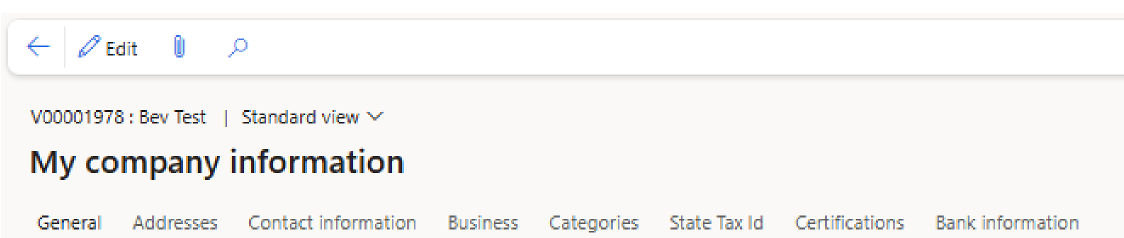


EDIT VENDOR INFORMATION

Click the **More details** dropdown in picture reference 3 and select an option to view and/or edit the organization's basic information.



When any section is selected you come to the My Company Information screen. Across the top are the sections for collecting and editing vendor information. The information housed in each section and how to edit is described below. In any of the sections, you can select Edit in the top ribbon or click in the desired field to edit.



GENERAL

Vendor profile and certifications – Diversity certifications

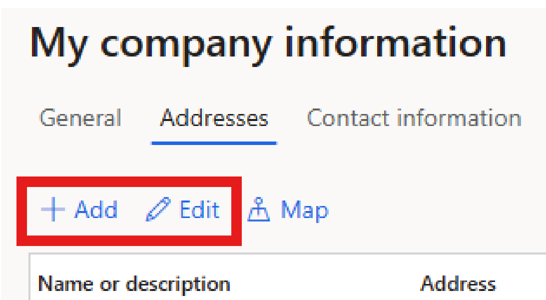
Other fields are presented under Organizational Details that do not need to be completed.

- To edit any fields in this section, click **Edit** at the top left of the screen. If you indicate yes for any of the Vendor Profile categories, use the paperclip to attach documentation. See the instructions for attaching documents at *Using the Paperclip to Attach Documents*, page 17. Once finished select **Save** at the top left of the screen.

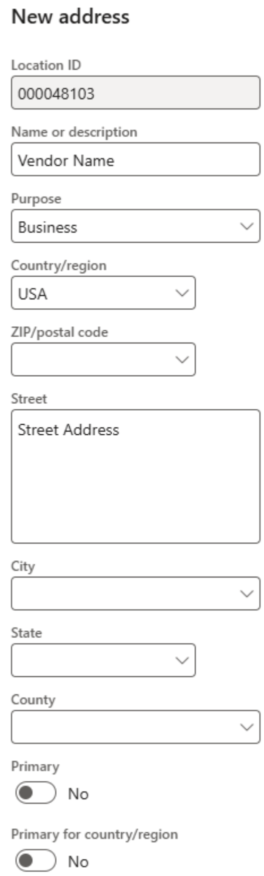
ADDRESSES

This is the main address for the vendor

- To edit the main address, select Edit. To add a secondary address, select **Add**.



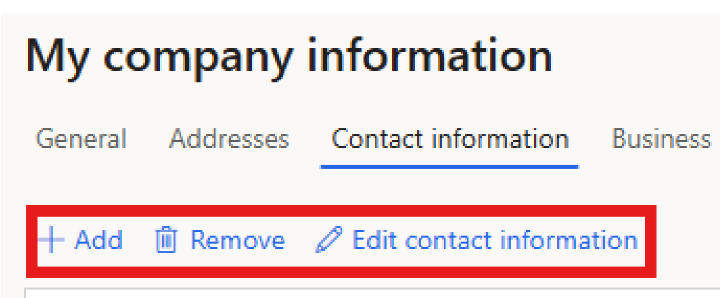
In either instance, a screen comes up on the right side to edit the current address or enter a new address. If a new address is to be the primary address, toggle **Primary** to "**Yes**". Once finished, select **Save** at the top left of the screen.



CONTACT INFORMATION

Vendor representatives contact information. Email address. Phone number, website, social media accounts

- Click the **Contact information** tab. Use the **Add, Remove** and **Edit contact information** buttons to add, remove or edit existing company contact information. Once finished, select **Save** at the top left screen.

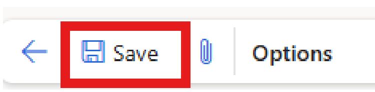


BUSINESS

Sales tax, 1099 reporting, Federal Tax ID, Bank information

Current banking information is displayed within this screen in the **Bank Information section**. The bank information in this section is informational only and edits made in this section will not be retained. To edit Bank information, use the “Bank Information” tab.

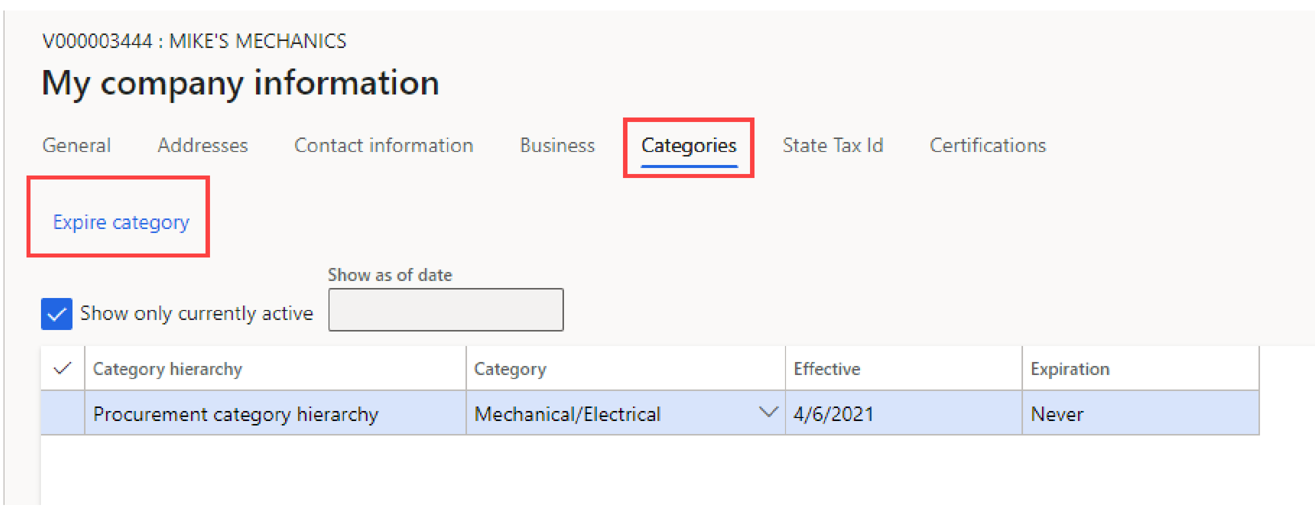
- To edit any fields in this section, simply select the desired field, delete the old information, and enter the update information. If you update W-9 information, use the paperclip to attach a new Form W-9. See the instructions for attaching documents at *Using the Paperclip to Attach Documents*, page 17. Once finished, select **Save** at the top left of the screen.

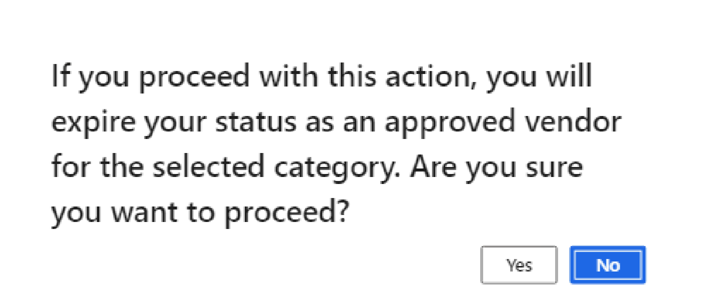


CATEGORIES

Procurement Categories describing type of goods or services provided

- This tab displays the list of active and inactive procurement categories associated with the vendor account. To remove a procurement category, select that category from the list, click the **Expire category** button and follow the prompt to deactivate that procurement category. Select **Save** at the top left of the screen.





- New categories cannot be added. If a new category is needed, contact us at LRAAVendor@flylouisville.com.

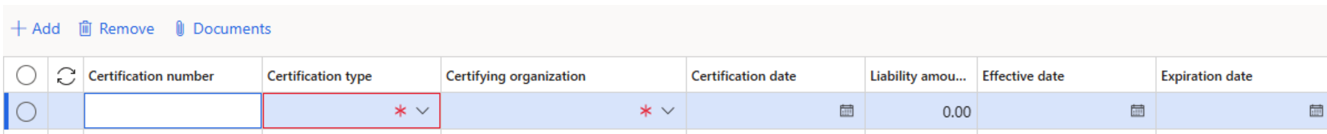
STATE TAX ID

State tax exempt number – These fields are not needed

CERTIFICATIONS

Licenses, Certifications, Disadvantaged Business Certifications

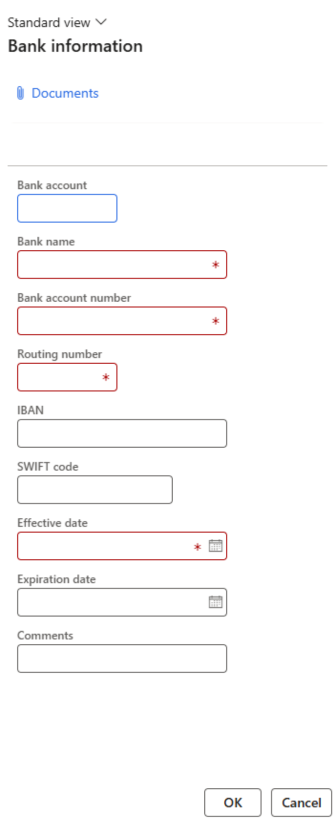
- Information shown on this tab cannot be edited, only new information can be added. To add a line, select Add. Another line will be added where the new information can be populated. Please use the paperclip to attach corresponding support documents. Instructions at *Using the Paperclip to Attach Documents*, page 17.



BANK INFORMATION

Bank accounts

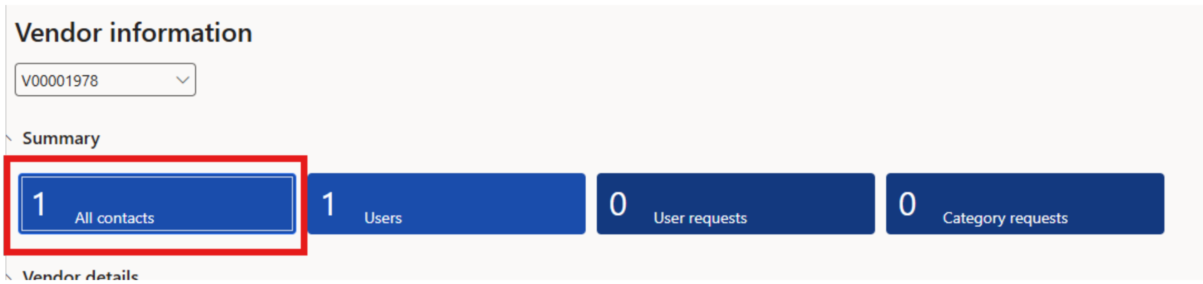
- This tab displays the bank account information used for ACH payments. When a change to the bank account information is needed, a new line must be added. Selecting **Edit** only allows for an effective date or expiration date to be entered on an account. To add new account information, select **Add**. A screen on the right appears where the banking information can be added. Add an effective date for this new banking information to supersede existing banking information. Select **OK**, then select **Save** at the top of the screen. **<u>All new banking information will be verified by LRAA before going into effect.</u>**



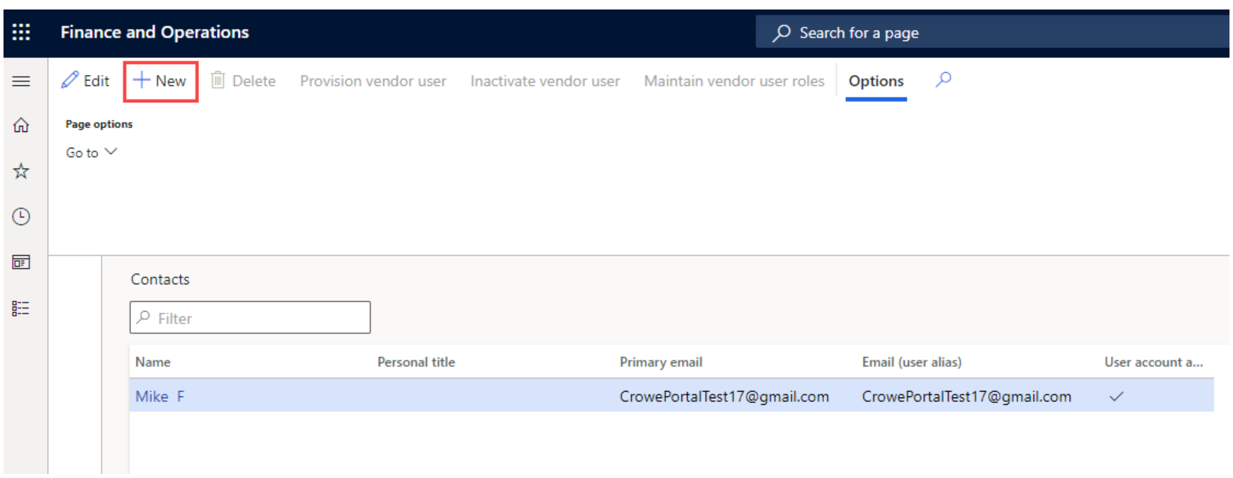
EDIT VENDOR PORTAL USERS

Add a Contact

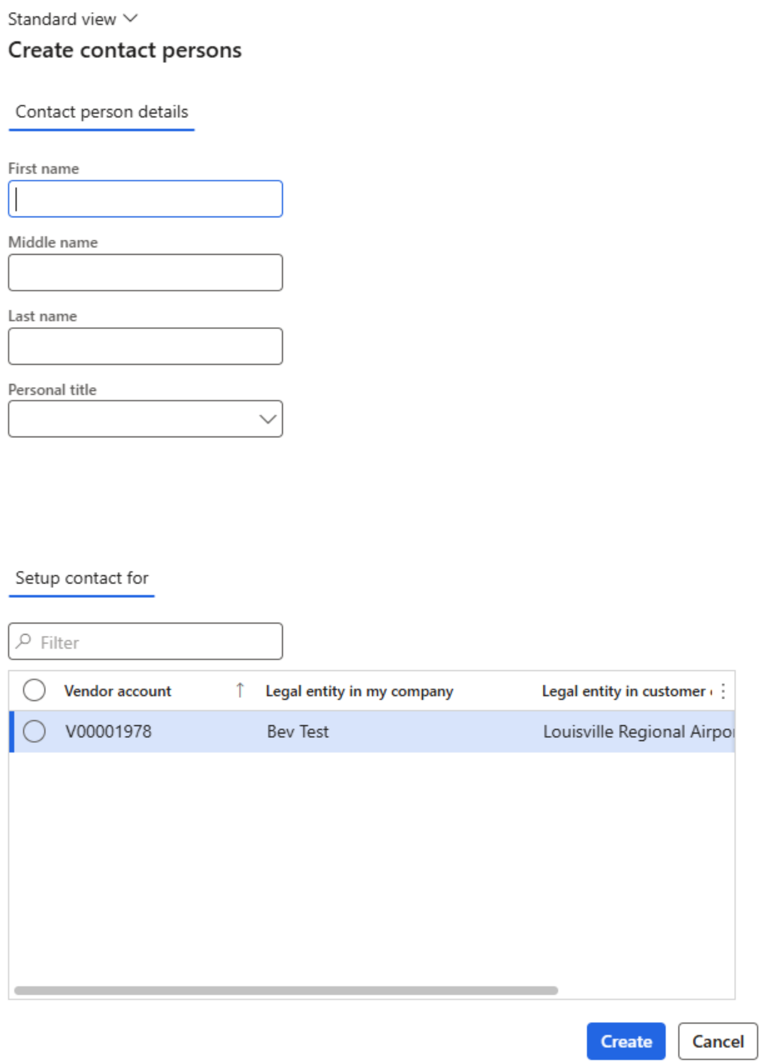
Within the **Vendor information** workspace, summary level contact information can be viewed on the **All contacts** tab. Click the **All contacts** tile to access the detailed listing of vendor contacts and to perform various actions.



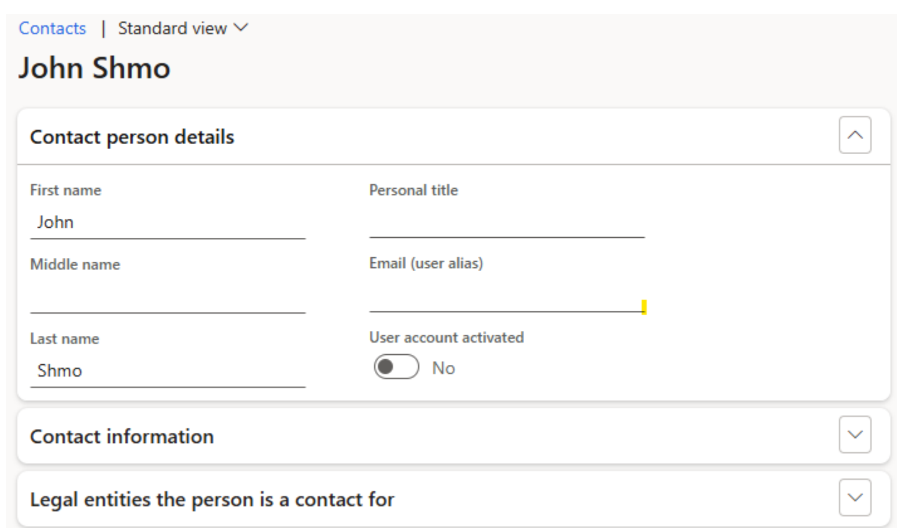
- Use the **+ New** button to add new contacts and initiate their Dynamics user provisioning process.



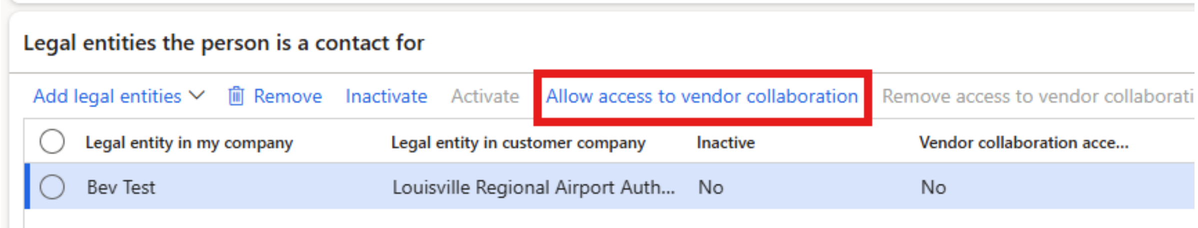
- Within the **Create contact persons** screen, enter a **First name**, **Middle Name** (if applicable) and **Last Name.** In the **Setup contact for** tab at the bottom of the screen, select the legal entity that the contact will be setup for (if multiple apply). Once all of the required information has been entered, click **Create**.



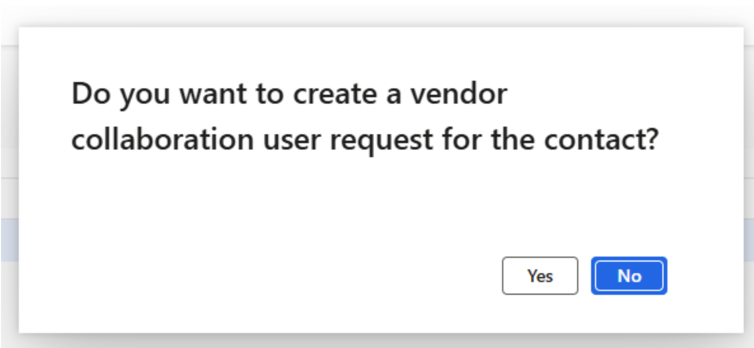
- A contact page will appear for the new user. To expand the desired section, select the dropdown arrow at the far right of the section.



- In the “Legal Entities” section, select **Allow access to vendor collaboration**.



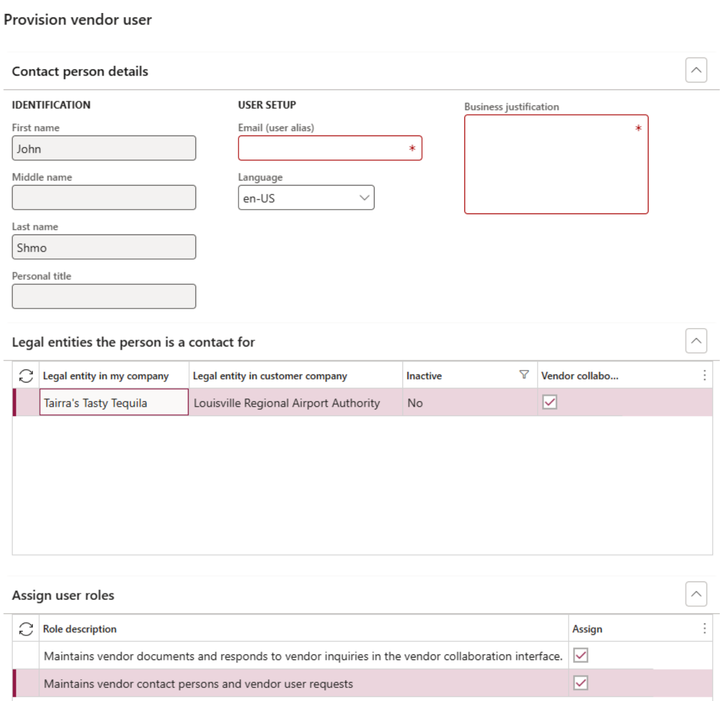
- Pop-up screen will verify you want to send a request to this user, select Yes.

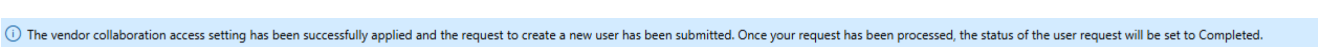


Add email address in USER SETUP. A note has to be added in the Business Justification box.

Open Legal Entities section via the dropdown arrow, select the vendor collaboration box.

Open assign user roles section via the dropdown arrow, check both boxes. Select submit. You will get a message in a ribbon across the top of the screen stating the request has been submitted. Once complete, the user request will be COMPLETE.

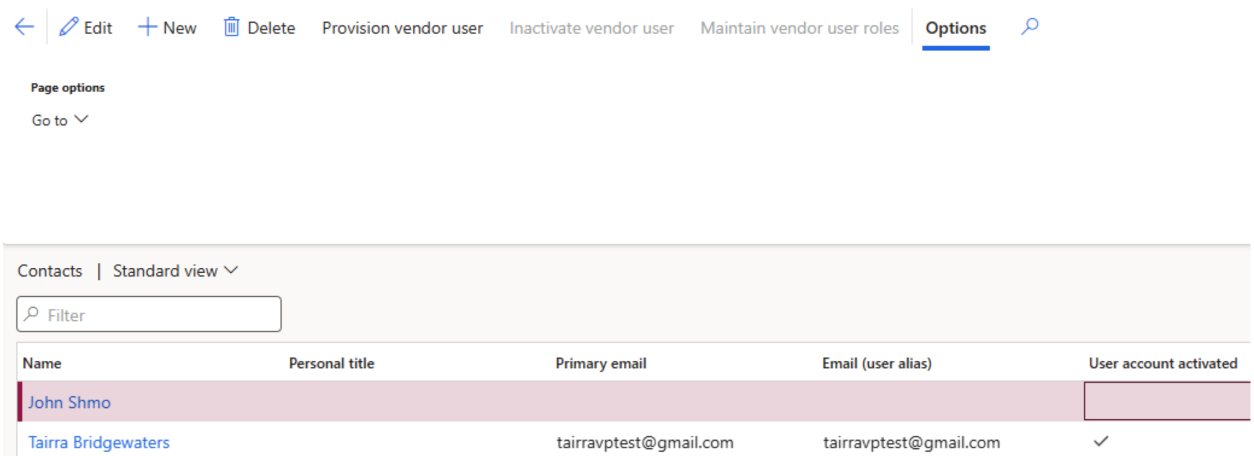


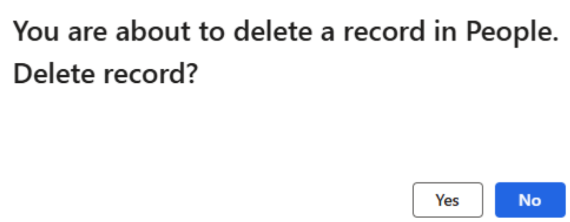


- Select arrow at top left of screen to go back to Contacts page.

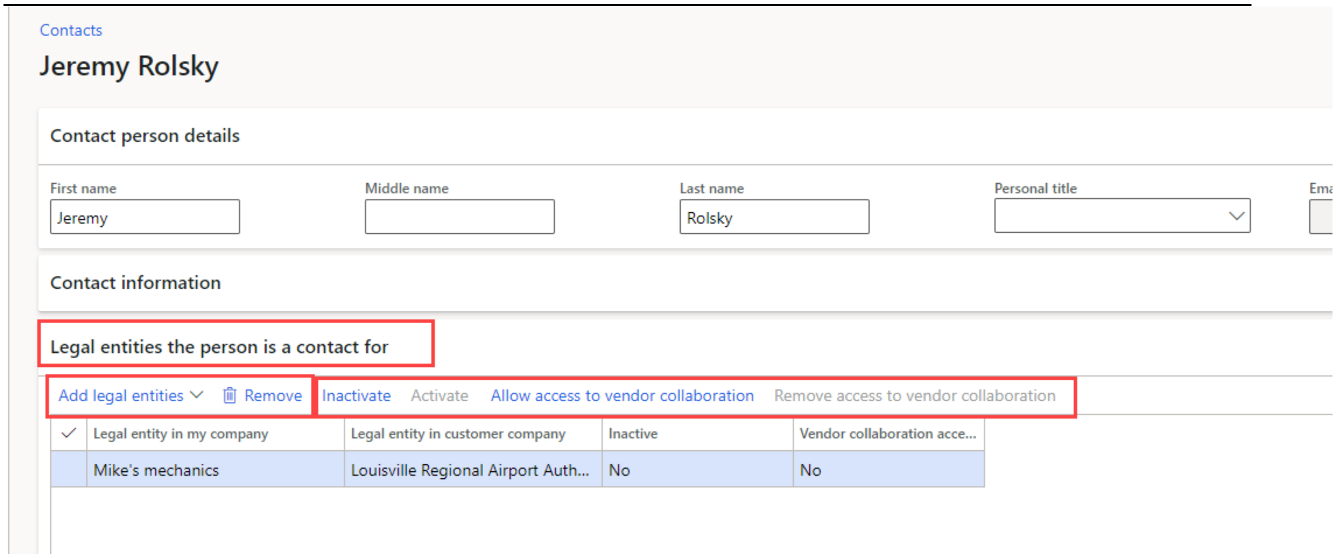
Remove a Contact

- There needs to be more than one contact established before a contact is removed. If needed, set up the new contact first. Then, use the **Delete** button to delete existing contacts. *Please note that the main vendor admin contact record cannot delete themselves.*

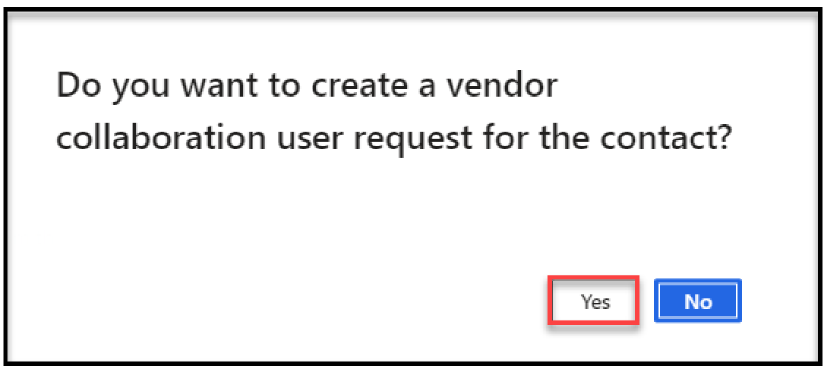




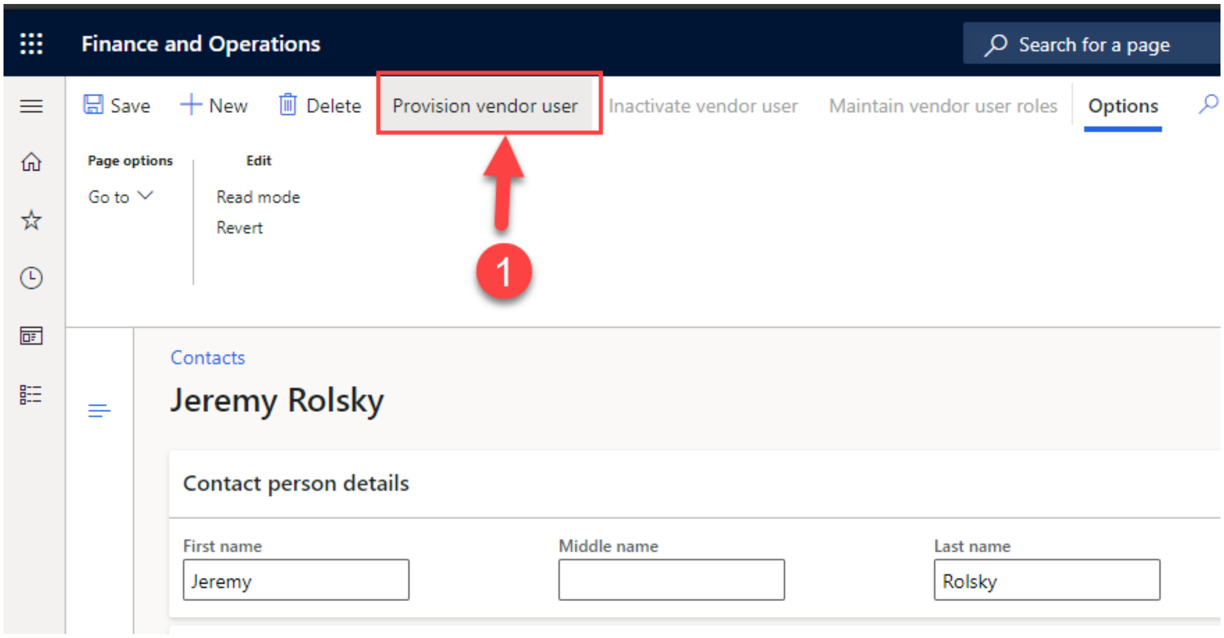
- To adjust a Contact's status, select their name and Within the **Legal entities the person is a contact for** fast tab of the same form, use the **Remove, Inactivate, Activate, Allow access to vendor collaboration** and **Remove access to vendor collaboration** buttons to perform various actions for that vendor contact.
  - **Remove:** removes the link between that contact and the vendor organization's account in Dynamics.
  - **Inactivate**: inactivates the association between the contact person and the vendor account in Dynamics. This option is only available when **Inactive** is set to "**No**" on the record.
  - **Activate:** Activates the association between the contact person and the vendor account in Dynamics. This option is only available when **Inactive** is set to "**Yes**" on the record.
  - **Allow access to vendor collaboration:** Allows the contact's Dynamics account to access the vendor collaboration portal. This option is only available when **Vendor collaboration access allowed** is "**No**". ***Note****: If the contact has not yet been provisioned as a vendor portal user, a user request will need to be initiated and processed. Proceed to the next step of this TPD for details on this process.*
  - **Remove access to vendor collaboration:** Disallows the contact's Dynamics account to access the vendor collaboration portal. This option is only available when **Vendor collaboration access allowed** is "**Yes**.



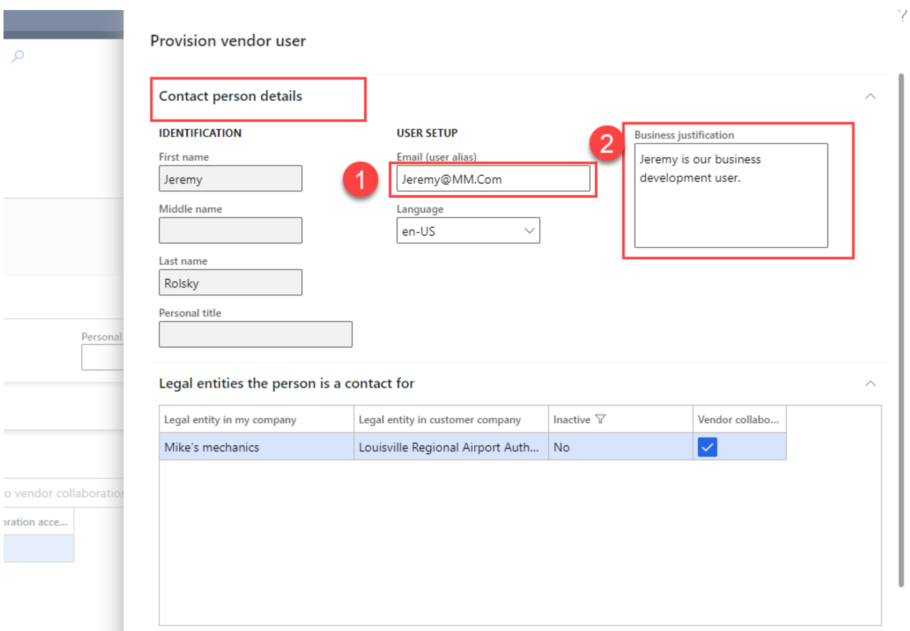
- **(Optional step for when "Allow access to vendor collaboration" button is selected in previous step):** The prompt in the screenshot below will be displayed. Click "**Yes**" to create the vendor collaboration user request for the newly created contact.



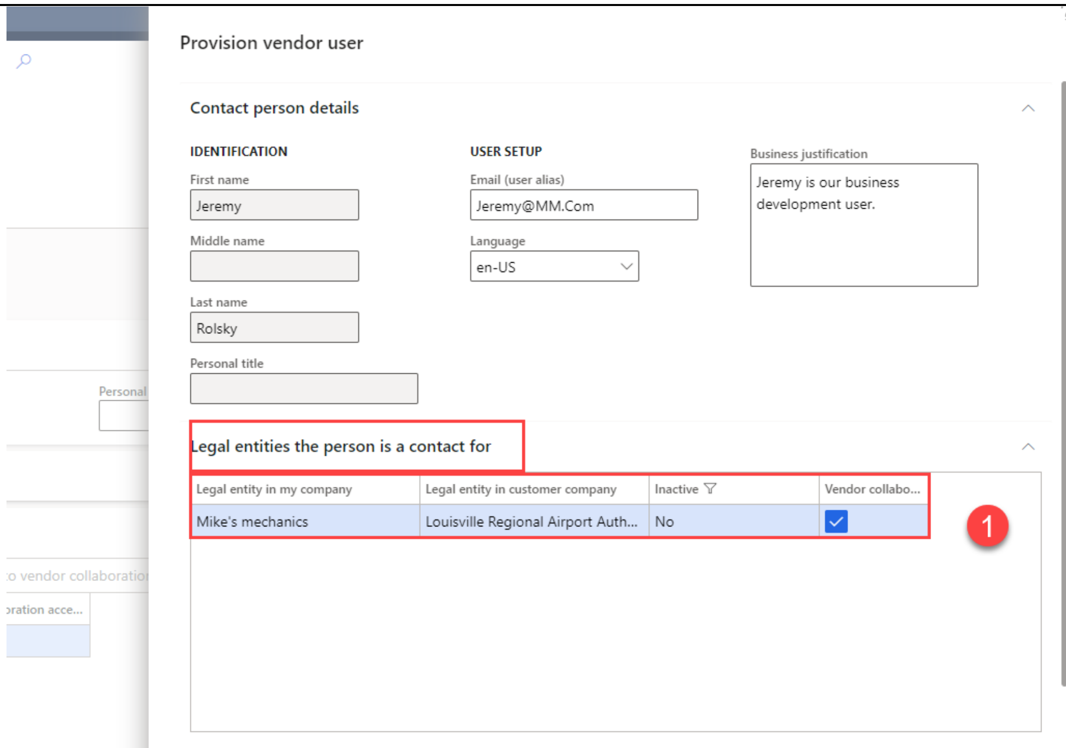
- Select **Provision vendor user** in the ribbon.



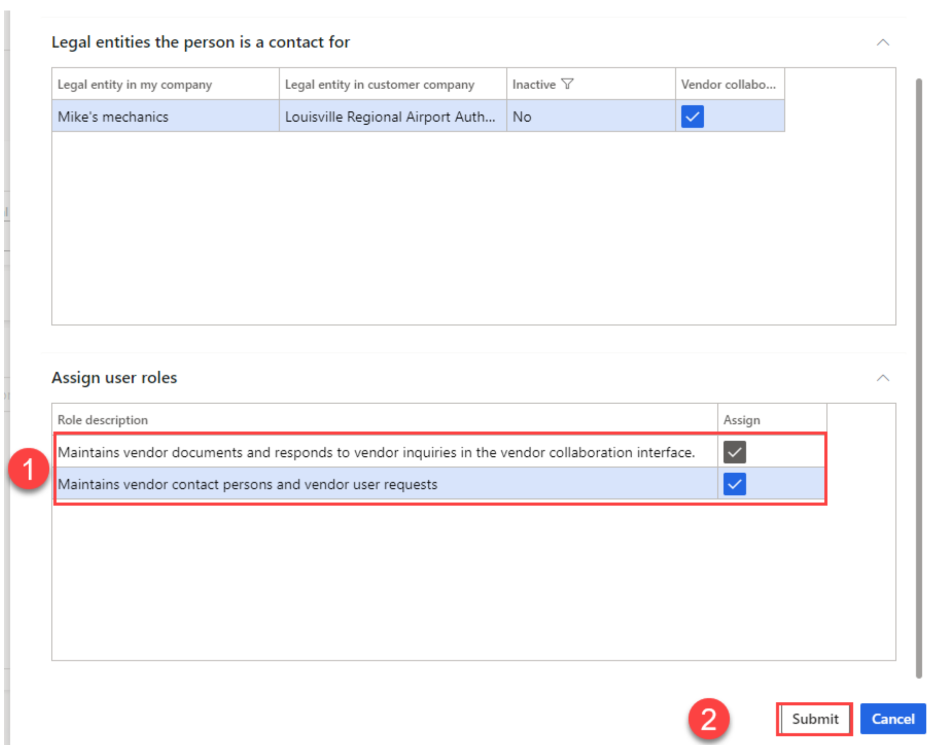
- Within the **Contact person details** fast tab of the **Provision vendor user** form, enter the contact's **Email (user alias)** and a **Business justification. This information is required to be entered again.**



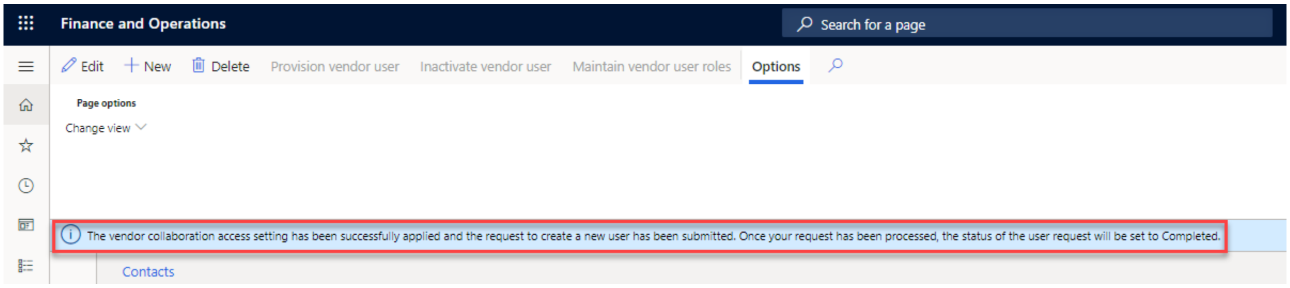
- Within the **Legal entities the person is a contact for** fast tab, check the **Vendor collaboration access allowed** box.



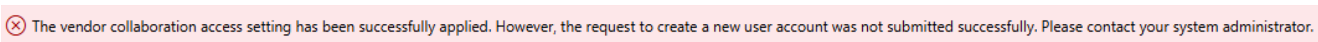
- Within the **Assign user roles** fast tab, check the box in the **Assign** column to assign the appropriate security role(s) to the contact's Dynamics account. Once all information has been specified, click **Submit**.



- Dynamics will display the following confirmation message upon successful submission.

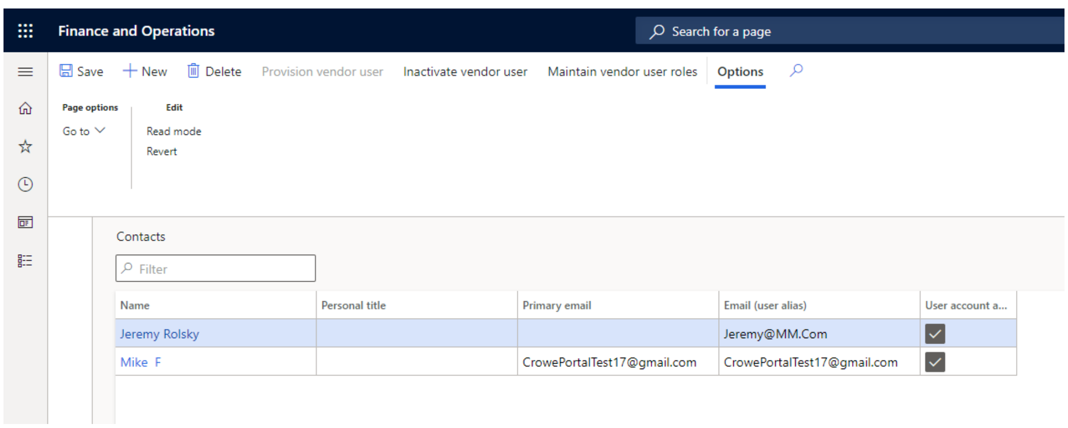


If you receive the below message, please contact LRAAVendor@flylouisville.com for assistance.



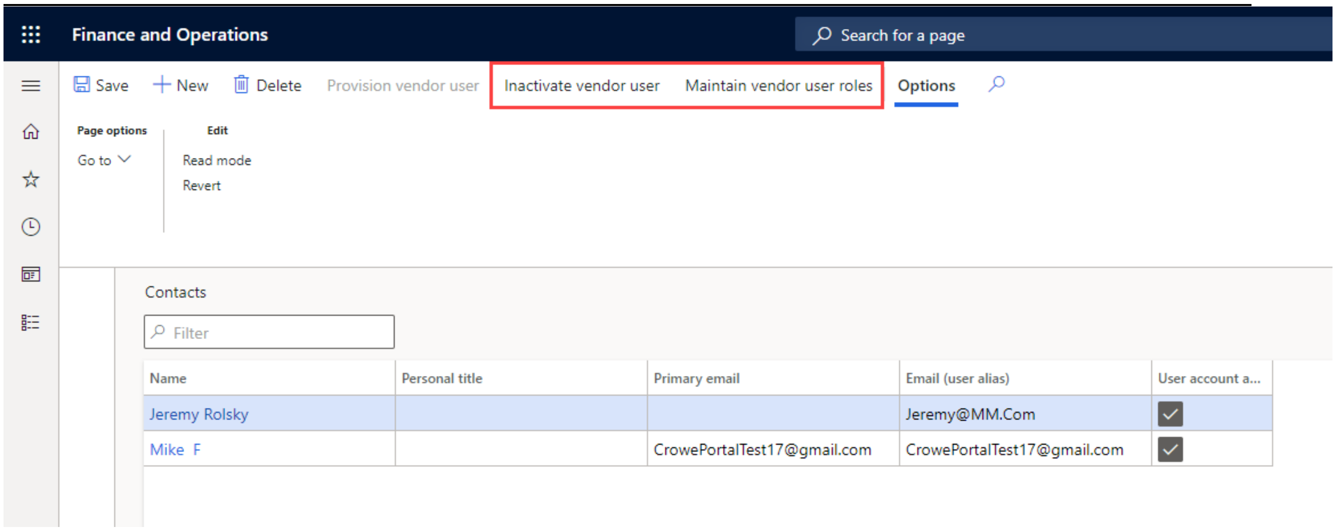
Select the back arrow at the top left-hand corner of the screen to display the Contact's page.

- Once the user account request has been processed, the **User account activated** box will be ticked in the **Contacts** form.

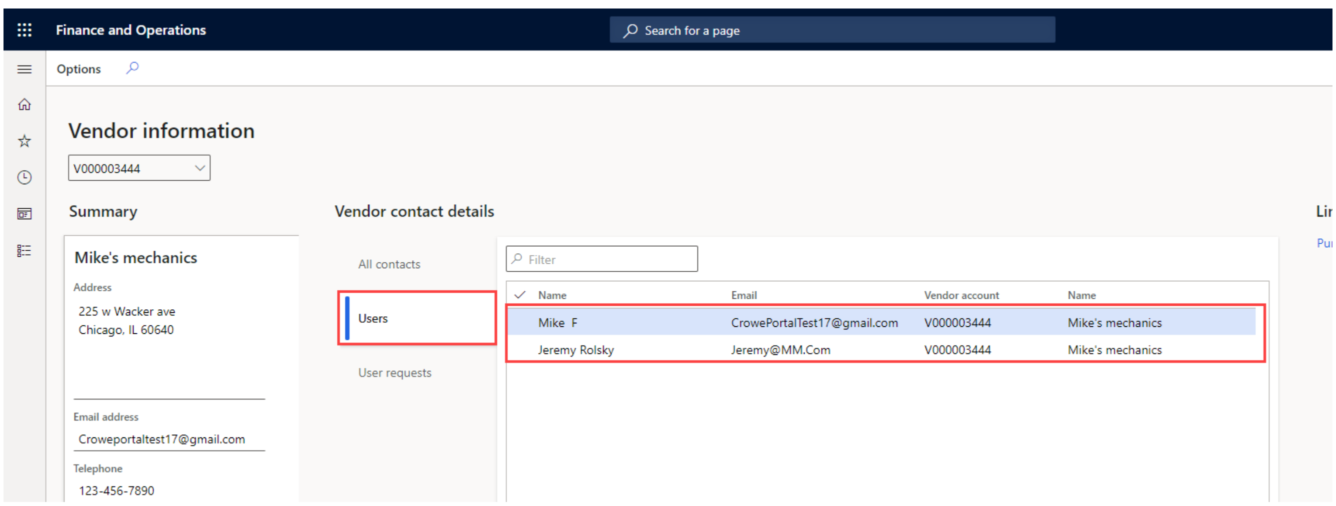


- Within the same **Contacts** form, use the **Inactivate vendor user** and **Maintain vendor user roles** buttons to inactivate vendor users or to update security role assignments for each contact listed in the organization.

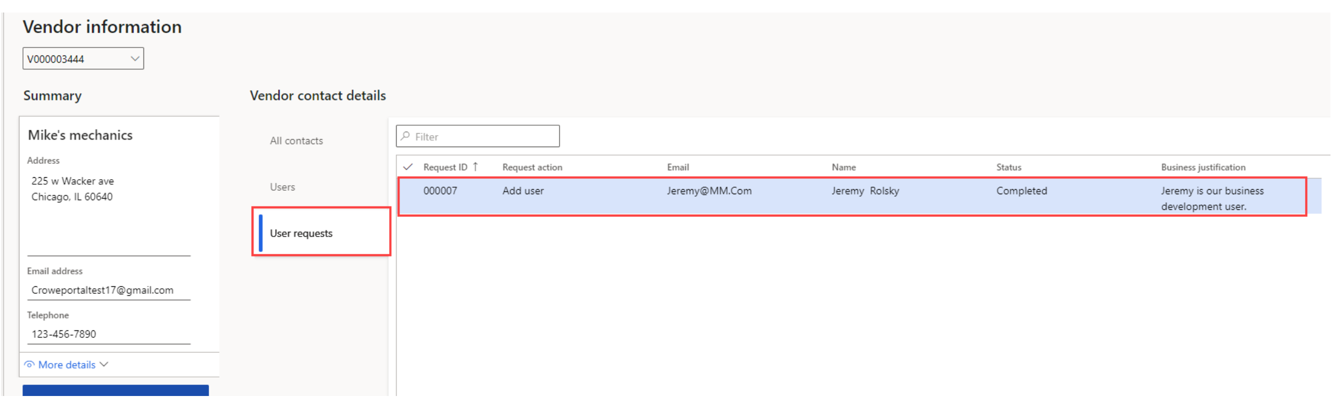
***Note**: The **Inactivate vendor user** and **Maintain vendor user roles** forms generally function in the same manner as described in the previous steps to provision a new vendor user. Please note that certain fields on these forms will be non-editable, as they will not be relevant to the specific process.*



- Navigate back to the **Vendor information** workspace, existing user information can be previewed in the **Users** tab or the **Users** tile.

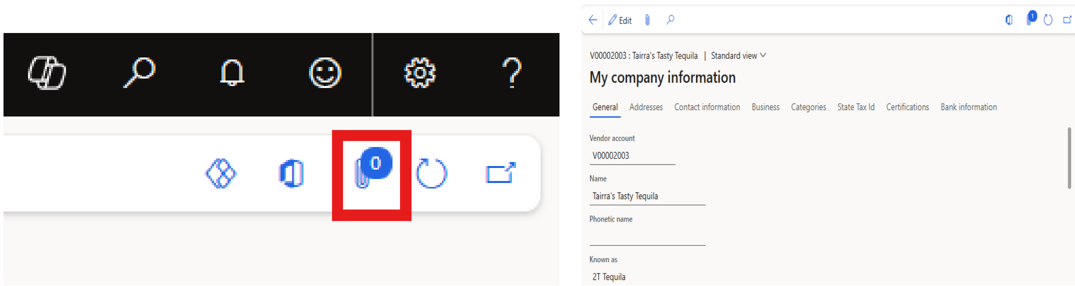


- Within the **Vendor information** workspace, the **User requests** tab and tile can be used to view and monitor system requests, such as the addition of a new user account or the modification of an existing user account (for example, user account inactivation, a change in security role assignment, etc.).

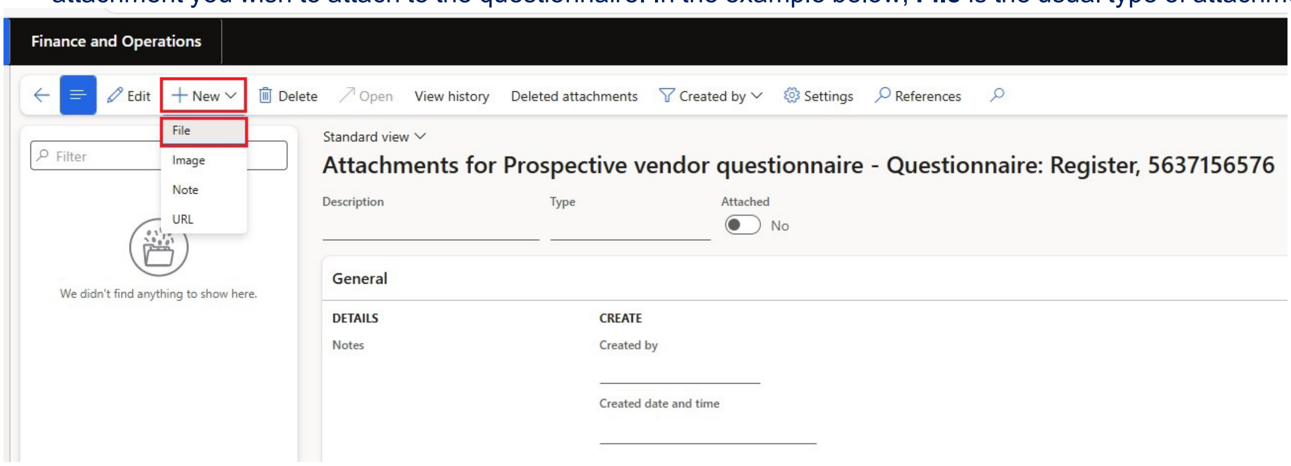


USING THE PAPERCLIP TO ATTACH DOCUMENTS

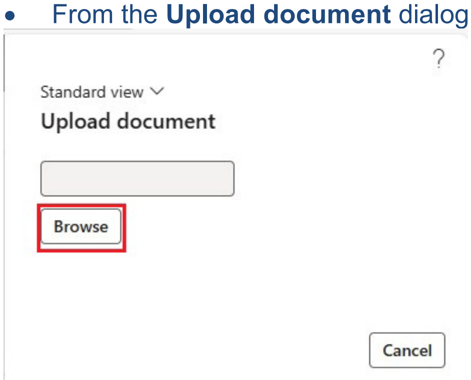
- The Company Information section is where supporting documents for licenses, certifications and Form W9 are submitted as an attachment. Attachments can be added by using the paperclip located at the top left or top right of the screen.



- Select the paperclip to go to the Attachments form. Click **+New** dropdown menu then select the type of attachment you wish to attach to the questionnaire. In the example below, **File** is the usual type of attachment.



- From the **Upload document** dialog box, click **Browse**.



- From the Open form, navigate to the folder where the file you want to attach is located. Select the file, then click **Open**.

- You should see a message displayed saying the file has been uploaded. Repeat these steps to add additional support documents. Once all files have been added, select **Save** at the top left of the screen. Click the **back arrow** icon seen at the top left of the form to go back to the previous screen.