UNFI Supplier Portal

Quick Reference Guide

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Account Setup

UNFI will set up a group administrator for each supplier. The group administrator can set up others for access to the supplier's account in the Supplier Portal.

Note: UNFI Supplier Relationship Managers will identify one person at each supplier company to be set up as an administrator for that supplier on the UNFI Supplier Portal. Each supplier has one administrator by default. The administrator may add additional administrators. (See instructions below for information about designating roles.)

Group Administrator Account Setup

The group administrator will receive an email with the subject "Account details for [your username here] at UNFI Supplier Portal." If you don't see the message, check your spam folder. If the message is labeled as spam, be sure to adjust the settings to allow all emails from UNFI.

1. Click the account activation link in the email to continue. The link can also be copied and pasted into your web browser's address bar.
2. Once the Supplier Portal loads, click **Log in**.
3. Fill in the required fields. **Please note**: if this email was forwarded to you, you will need to replace the email address that automatically populates in email address field with your own email address.
4. When choosing a password, choose one that is at least 8 characters long, contains at least one number, one special character (@, %, !, etc.) and both an uppercase and lowercase letter.
5. Click **Save**.

Your administrator account is now active. As an administrator, you can add other users to your organization's group and manage existing users.

User Account Setup

There are 4 steps to set up a new user with access to the UNFI Supplier Portal.

- The new user requests an account
- The new user asks the group administrator to associate their username with the supplier account in the portal
- The group administrator grants the user access to the Supplier account in the portal
- The new user activates the account, chooses a password and logs in.

New User Requests an Account

1. Navigate to http://Suppliers.onUNFI.com and click **Create new account.**
2. Enter the requested information in each field; all fields are required. Choose a username that you will use every time you log in to the Supplier Portal. You'll also provide this username to your administrator. You may use your email address.
3. Accept the Terms & Conditions of Use and acknowledge receipt of the UNFI Supplier Policies and Guidelines.
4. Click the **Create new account** button.

New User Requests Access from the Group Administrator

1. Contact your Group Administrator to request access. Provide your username. If you do not know who your administrator is you can email SupplierSupport@unfi.com.

The Group Administrator Grants Access to the New User

Note: These steps can only be performed by group administrators.

1. Obtain the user's username.
2. Identify the supplier the user should be added to. From the Dashboard, click the supplier's name in the My Suppliers box.
3. Click **Group,** below the supplier name.
4. Click **Add People.**
5. Enter the username into the User name box.
6. Optionally, select a role for this user. By default, any user can add new contacts and warehouses. Two additional user types exist:
    - **Administrator** members have all the special abilities of the initial administrator account: adding users and modifying and deleting contacts and warehouses.
    - **Editors** can modify existing contacts and warehouses but cannot delete them.
7. Click **Add users.**

The New User Activates their User Account

1. You will receive an email with the subject "Account details for [your username here] at UNFI Supplier Portal." If you don't see the message, check your spam folder. If the message is labeled as spam, be sure to adjust the settings to allow all emails from UNFI.
2. Click the account activation link in the email to continue. The link can also be copied and pasted into your web browser's address bar.
3. Once the Supplier Portal loads, click **Log in**.
4. Choose a password at least 8 characters long, containing at least one number, one special character (@, %, !, etc.) and both an uppercase and lowercase letter.
5. Click **Save**.

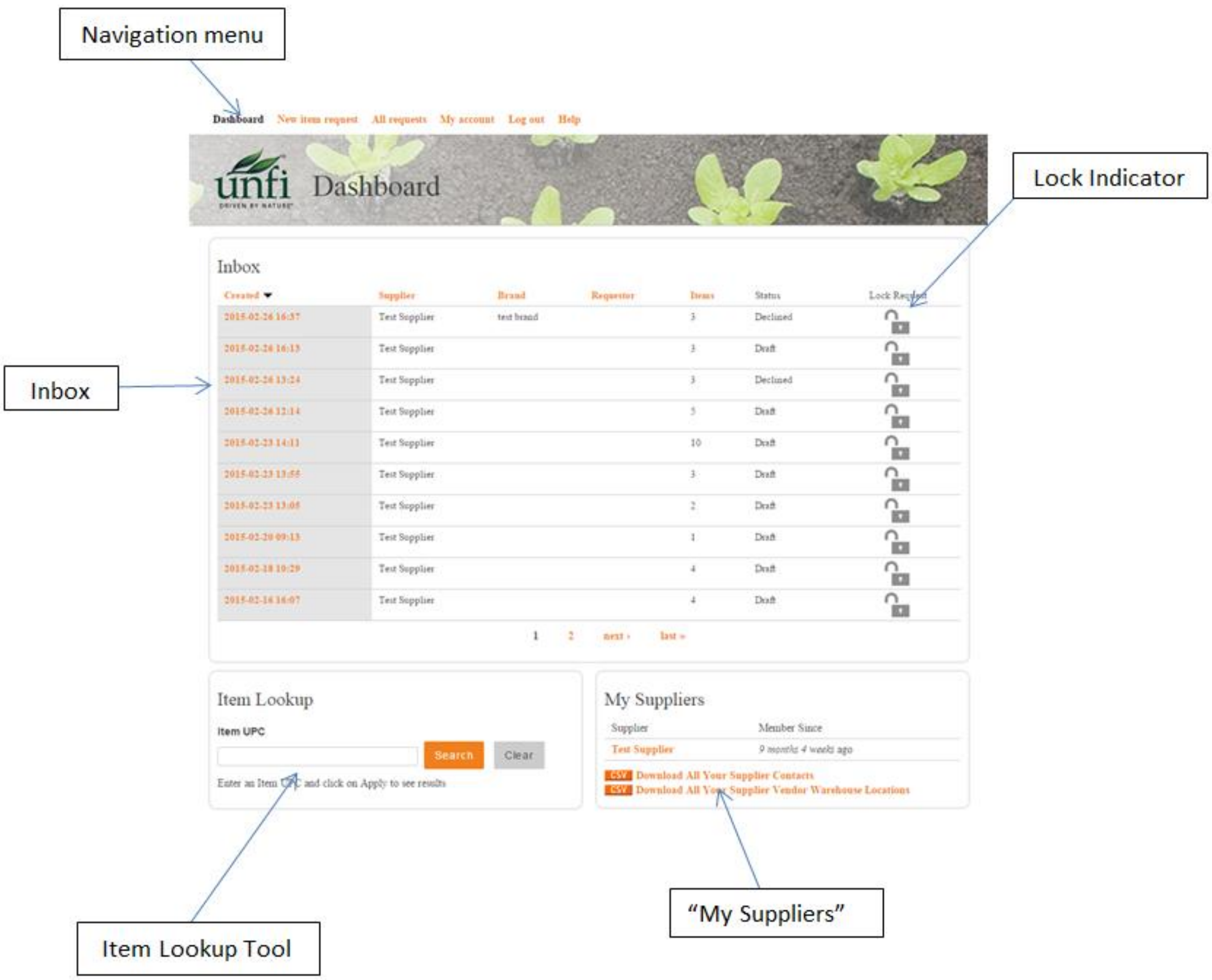
Dashboard

The home page of the Supplier Portal is the **Dashboard**. At the top of the **Dashboard** you will see the navigation menu; it is used to navigate within the portal to any of the following pages:

- **New item request** brings you to a page used to submit new items.
- **All requests** brings you to a page where you can view all the requests you've submitted that are still pending final approval.
- **My account** takes you to a page where you can change your personal information such as your email and password.
- **Help** contains support information.

The **Dashboard** contains an Inbox, which lists any requests that require your attention. Click the creation date to view a request. The Inbox also has a lock indicator to let users know if anyone else is currently working on that request. Click on the icon to lock or unlock.

On the bottom of the **Dashboard** is the My Suppliers box, which contains links to all the suppliers your account is associated with; most users will only have one. Click the supplier's name to view the **Supplier Information** page. The My Suppliers box also has links to download supplier contact info and vendor warehouse locations. There is also a tool available to lookup items by UPC.



Supplier Information

The **Supplier Information** page allows you to manage the information UNFI has on file for your supplier(s), including contacts, warehouse pickup locations, and user accounts. Depending on the permissions set by each supplier's group administrator, some users may not have access to all the functions of this page.

Create Contacts

- From the **Dashboard** click a supplier in the My Suppliers box.
- On the **Supplier Information** page, click **Add new Supplier Contact** under the Contacts heading.
- On the **Create Supplier Contact** page, enter the contact's information; required fields are indicated with an asterisk (*).
- You can also select the "Primary Contact" checkbox to denote this contact as the Primary Contact for that supplier; each supplier has only one Primary Contact.
- Click **Save** at the bottom of the page to save this contact.

Modify Contacts

- Some users are able to edit or delete contacts based on their role assigned by an administrator.
- Click the link next to the contact you wish to modify to change a contact's information.

Create Warehouse

- From the dashboard, click a supplier in the My Suppliers box
- On the **Supplier Information** page click **Add new Vendor Warehouse Location**
- Fill out the form; required fields are indicated with an asterisk (*).
- Upload a freight form by clicking **Choose File** and selecting your freight form. The freight form is required.
- If you need the UNFI freight form, a link is provided below the submission box.
- When complete click **Save**.

Modify Warehouse

- Some users are able to edit or delete warehouses based on their role assigned by the administrator.
- Click the link next to the warehouse you wish to modify to change a warehouse's information.

New Item Request

This page is used to submit information about a new item to UNFI. It replaces the former Excel-based New Item Form. You may only submit items already approved by your Supplier Relationship Manager; all others will be rejected.

Required fields are indicated with a red asterisk (*). Requests may be saved and submitted at a later time, but to do this all required fields must be filled in. The following information is collected on the New Item Request:

- Item Details
- UPCs
- Pack and Size
- Vendor Warehouse Locations
- Distributor Costs East
- Distributor Costs West
- UNFI Warehouse Locations
- Packaging Specifications
- Shelf Life
- Origin
- Certifications
- Product Ingredient Information
- Attributes (Organic, Gluten Free, etc.)
- Beverages
- Marketing
- Retail Category Management
- Promotions
- Shipper Info

We recommend you gather all important documents and relevant information prior to filling out the New Item Request.

Once you enter some basic info on the first page of the New Item Request you will click **Save** on the bottom of the page. This will bring you to the Request Items page; here you will enter all of the item information. The page is broken up into 18 tabs. You can navigate these tabs on the left side of the page, but be sure to click **Save** at the bottom of each page to save the information you've entered.

If you are submitting more than one item you will notice that each tab will have a section for each item. If the information you're entering applies to more than one item you will use the pink Master Record section at the top of the page. Information entered in the Master Record section is applied to each of the items. To edit a column individually click ***Edit Items*** above the column, at which point you can scroll down to enter info manually.

Once all the information has been submitted you will be brought to the Workflow page. From here you can use the gray tabs towards the top of the page to view or make changes, otherwise use the **Submit for Review** button on the Workflow tab to submit the request.

Workflow

When a New Item Request requires your action, it will appear in the Inbox on the **Dashboard**. Click the title to load the request. Here you can view and edit the request, or view the workflow, using the tabs at the top of the request.

Clicking the **Workflow** tab will display the request's workflow as well as any comments that have been added. You can add comments to the request's workflow in the box provided before submitting. If the request needs to be submitted to UNFI at this time, click **Submit for Review**.

If this request was declined by UNFI, the workflow indicates where in the process it was declined and you can review the comments to determine what needs to be changed before resubmitting the request.

Support

Click **Help** at the top of any page to review the Supplier Portal support information. Here you will find FAQs, a glossary of terms, and up-to-date Supplier Portal guides, such as this one. Additional questions can be directed to your UNFI Supplier Relationship Manager or email us at SupplierSupport@UNFI.com.