



Supplier Portal User Guide: Owner



August 2023

Welcome!

UNFI's suppliers and brokers can visit our Supplier Portal to find the following:

- New Item Packet Submission
- Promotional Form Submission
- Clearvue Reporting (if CV supplier)
- Supplier In-Site Reporting (if SCCV supplier)

This guide will walk you, the “Supplier Owner,” through the Supplier/User section and Dashboard of the portal.

Supplier Portal Owners

The Supplier Portal Owner can:

- Set-up users
 - Able to add new product packets
 - Run reporting if CV/SIS
 - Add a monthly special promotion
- Set-up Owners, Managers, and Users
 - Able to set-up other users
 - Manage the account
- Add their own new product packets, run reporting if CV/SIS, or submit a monthly special promotion under that supplier.

Supplier Portal User Guide: Owner

- 01 Login/Reset Password
- 02 Home Page & Dashboard
- 03 Adding New Owners, Managers, or Users
- 04 Editing/Removing Existing Users
- 05 My Account

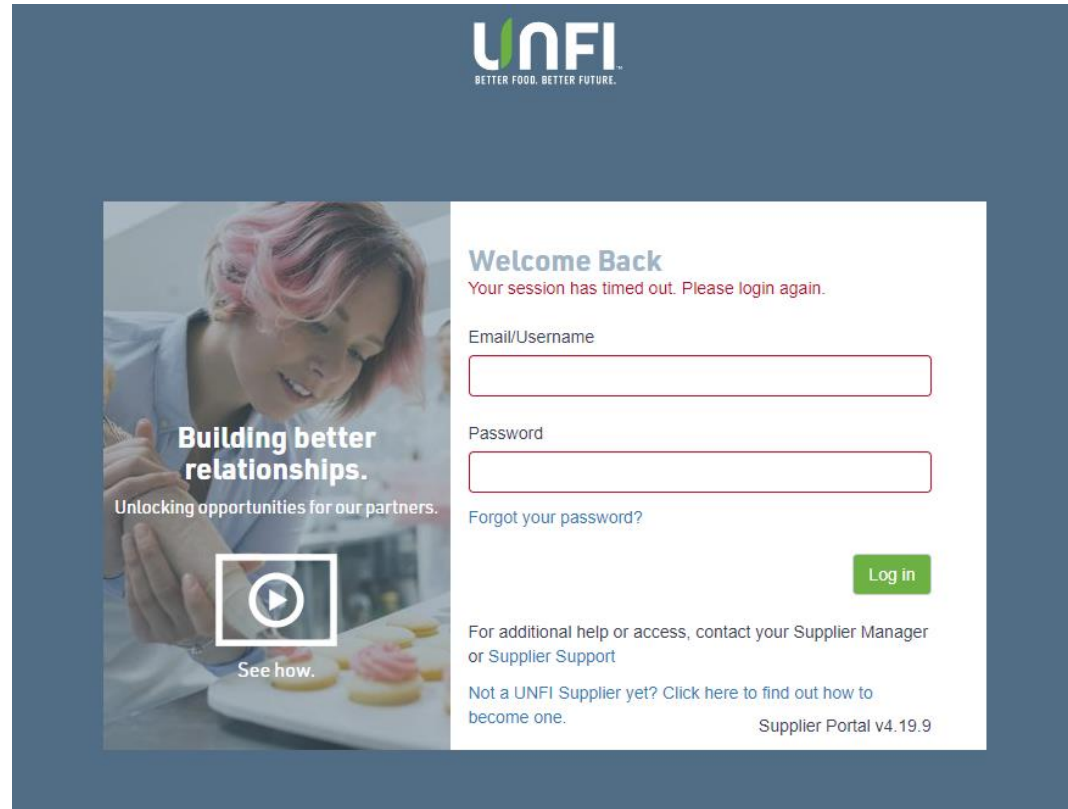


Login/Reset Password

01

How to Login & Reset Your Password

- Use your email to login at <https://suppliers.unfi.com/>
- If you forgot your password, click “Forgot your password.” Enter your email. A reset link will be emailed to you if you’re a valid user.



UNFI
BETTER FOOD. BETTER FUTURE.

Building better relationships.
Unlocking opportunities for our partners.

See how.

Welcome Back
Your session has timed out. Please login again.

Email/Username

Password

Forgot your password?

Log in

For additional help or access, contact your Supplier Manager or Supplier Support

Not a UNFI Supplier yet? Click here to find out how to become one.

Supplier Portal v4.19.9



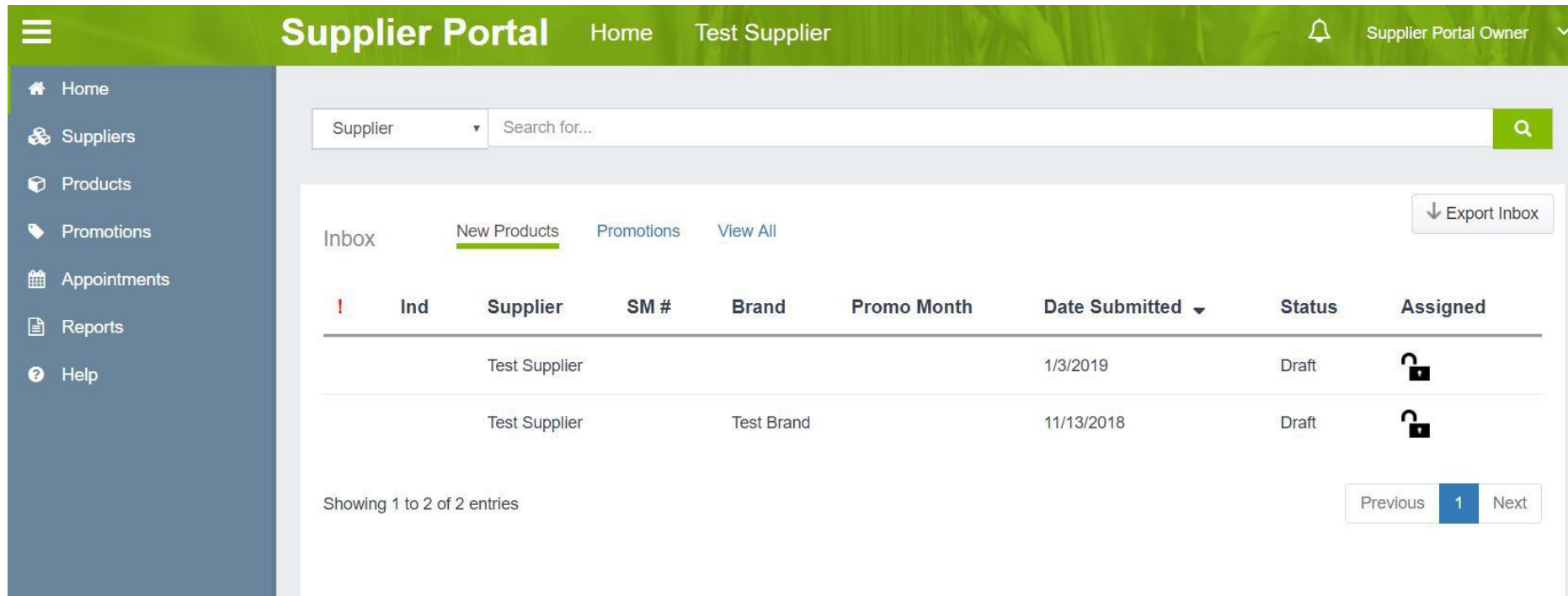
Home Page & Dashboard

02



Home Page

When you log in, you will be directed to your “Home” page.

From there, you’ll be able to navigate through the function tabs on the left.



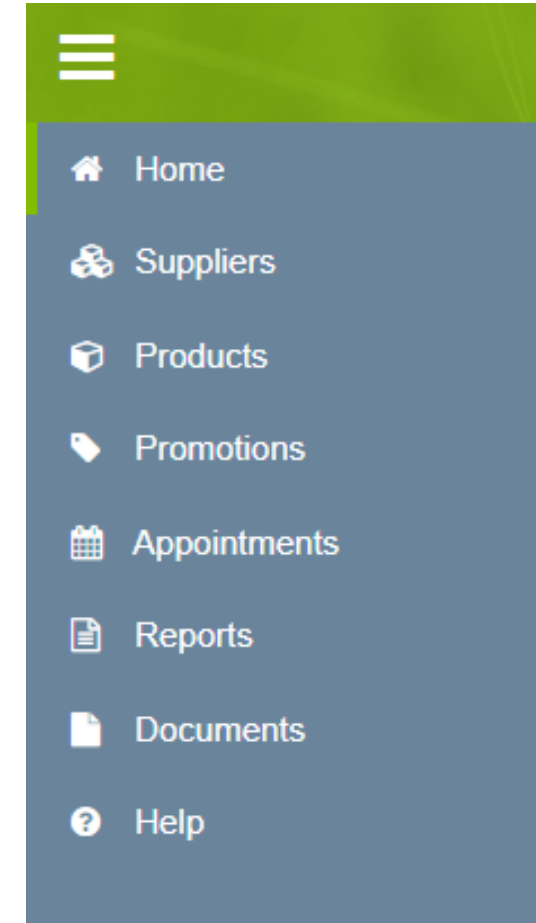
The screenshot displays the UNFI Supplier Portal interface. At the top, a green header bar contains the 'Supplier Portal' title, navigation links for 'Home' and 'Test Supplier', a notification bell icon, and the user's name 'Supplier Portal Owner' with a dropdown arrow. On the left, a dark blue sidebar lists navigation options: Home, Suppliers, Products, Promotions, Appointments, Reports, and Help. The main content area features a search bar with a 'Supplier' dropdown and a 'Search for...' input field. Below the search bar, there are tabs for 'Inbox', 'New Products', 'Promotions', and 'View All', with 'New Products' currently selected. An 'Export Inbox' button is located in the top right of the main content area. A table displays two entries, each with a red exclamation mark icon in the 'Ind' column. The table columns are: Ind, Supplier, SM #, Brand, Promo Month, Date Submitted, Status, and Assigned. The first entry shows 'Test Supplier' with a 'Draft' status and an assigned icon. The second entry shows 'Test Supplier' with 'Test Brand' and a 'Draft' status and an assigned icon. At the bottom left, it says 'Showing 1 to 2 of 2 entries'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.

Ind	Supplier	SM #	Brand	Promo Month	Date Submitted	Status	Assigned
!	Test Supplier				1/3/2019	Draft	
	Test Supplier		Test Brand		11/13/2018	Draft	

Dashboard

Fully functioning tabs at your fingertips:

- Home: Brings you back to the main dashboard
- Suppliers: Allows you to add and edit current users
- Products: Enter a new product packet to submit to your Supplier Merchandising Manager or Specialist
- Promotions: Submit a monthly special to our Promotional Team
- Appointments: Now handled through myUNFI
- Reports: Clearvue or SIS supplier? Reporting is accessed here
- Help: Need assistance? Navigate to our [ZenDesk](#) for additional materials or contact SupplierSupport@unfi.com.





Adding New Owners, Managers, or Users

03

Accessing All Users

You can now add new owners, users, or managers to your portal account.

- Step 1: Once you've logged in as the Supplier Owner, click on the "Supplier" tab to the left, in your Dashboard.
- Step 2: Click on the supplier's name you want to add users to.

The screenshot displays the UNFI portal interface. On the left is a dark blue sidebar with navigation links: Home, Suppliers (highlighted in yellow), Products, Promotions, Appointments, Reports, Documents, and Help. The main content area has a light gray header with a search bar labeled 'Search by supplier name or remit number' and a green search icon. Below the search bar are tabs for 'All Suppliers', 'Active' (underlined in green), and 'Inactive'. An 'Export Suppliers' button is in the top right. A table lists the suppliers with columns: Current Supplier, Supplier Name, Remit No., SM, and Reporting Access. One entry is shown: 'Test Supplier' (highlighted in yellow) with Remit No. 900003 and Reporting Access None. At the bottom, it says 'Showing 1 to 1 of 1 entries' and has pagination buttons: Previous, 1 (active), and Next.

Current Supplier	Supplier Name	Remit No.	SM	Reporting Access
<input checked="" type="radio"/>	Test Supplier	900003		None

Adding a New User

- Step 3: Click on “Associated Users” in the left panel. Here, you can see everyone who has access to your account.
- Step 4: Click the orange button on the right side of the screen.

Home
Suppliers
Products
Promotions
Appointments
Reports
Documents
Help

Company Info
Associated Users
Manage Contacts
Supplier Warehouses

Users

+ Add (New or Existing)

Name	Email	Role	
Jessica Glaude	jglaude@unfi.com	Supplier Owner	✕remove
Supplier Portal Owner	supplierportalowner@gmail.com	Supplier Manager	✕remove
UNFI Testing	unfiinsights@unfi.com	Supplier Owner	✕remove

Showing 1 to 3 of 3 entries

Previous 1 Next

Adding Information

- Step 5: Once you've clicked "+Add," the below screen will populate. Fill out the Email, First and Last Name, and choose global role: Supplier, Broker, or Carrier.
 - If adding a Broker, you'll want to choose "Manager" level so they can complete new item packets for you.

Email *	myUNFI Enrollment Status	First Name *	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Number	Mobile Number	Fax Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address 1	Address 2		
<input type="text"/>	<input type="text"/>		
City	State/Province	Postal Code	Country
<input type="text"/>	<input type="text" value="Select an Option"/>	<input type="text"/>	<input type="text" value="United States"/>
Company			
<input type="text" value="Search for..."/>			
Global Role			
<input type="text" value="Select an Option"/>			

Company Relationships

- Step 6: The below screen is required to set up any new user in the portal.
 - **Company Role:** You'll need to assign Owner, Manager, or User level to that person. You can also add Reporter here, if applicable.
 - Please Note: All brokers should be set up with "Manager" Access to complete packets.
 - **Contact Type:** This is the type of associate you are setting up (i.e., marketing, sales, broker).

Company Relationships

Company	Company Roles	Contact Types	[x]Default?	Broker Reporting
Test Supplier	<div>Supplier Owner ✕</div>	<div>Sales ✕</div>	<input checked="" type="radio"/>	<div>Select a... ▾</div> <div>Export Products 📄</div>

Showing 1 to 1 of 1 entries



Editing/Removing Existing Users

04

Access Existing Users

Once in the “Associated Users” page, you can edit or remove any user necessary.

- You can remove users who should no longer have access to your account by clicking “x remove” to the right of their name.
- Click on the existing user’s name to edit details or reset their password.

The screenshot displays the 'Associated Users' page in the UNFI system. On the left is a navigation sidebar with links to Home, Suppliers, Products, Promotions, Appointments, Reports, Documents, and Help. The main content area has a sub-navigation bar with 'Company Info', 'Associated Users' (selected), 'Manage Contacts', and 'Supplier Warehouses'. The 'Users' section features a table with three columns: Name, Email, and Role. There are three users listed: Jessica Glaude (Supplier Owner), Supplier Portal Owner (Supplier Manager), and UNFI Testing (Supplier Owner). Each user has a blue 'x remove' link to their right. An orange '+ Add (New or Existing)' button is in the top right. At the bottom, it says 'Showing 1 to 3 of 3 entries' and has 'Previous', '1', and 'Next' pagination controls.

Name	Email	Role	
Jessica Glaude	jglaude@unfi.com	Supplier Owner	x remove
Supplier Portal Owner	supplierportalowner@gmail.com	Supplier Manager	x remove
UNFI Testing	unfiinsights@unfi.com	Supplier Owner	x remove

Showing 1 to 3 of 3 entries

Previous 1 Next

Update Existing Users

Once you’ve clicked on the user, you can edit their details or update their Global Role.

Email *

supplierportalowner@gmail.com

myUNFI Enrollment Status

false

First Name *

Supplier Portal

Last Name *

Owner

Phone Number

Mobile Number

Fax Number

Address 1

Address 2

City

State/Province

Select an Option

Postal Code

Country

United States

Company

Search for...

Global Role

Supplier

Update Existing Users (continued)

If you scroll down on that page, you'll see "Company Relationships." Here you can:

- Update Company Role & Contact Type
- Reset a user's password – Click "Resend Confirmation Email" at the very bottom of the page.

Company Relationships

Company	Company Roles	Contact Types	[x]Default?	Broker Reporting
Test Supplier 900003	Supplier Manager	Accounts Receivable, Sales	<input type="radio"/>	<div>None</div>

Showing 1 to 1 of 1 entries

Last Login

Mon Aug 12 2019 09:23:13 GMT-0400

Email Confirmed?

Yes

✓

Resend Confirmation Email



My Account

05

Updating Account Details

To update your account details, click the drop down next to your name and “My Account.”

Supplier Portal

Home

Test Supplier

Jessica Glaude

My Account

Log out

Supplier

Search for...

Inbox

New Products

Promotions

View All

7 Simple Steps

Export Inbox

!	Ind	ID	Supplier	SM #	Brand	# Items	Promo Month	Date Submitted	Status		Assigned to
		10728	Test Supplier			5			Draft		
		17050	Test Supplier			1			Draft		
		17060	Test Supplier			1			Draft		

Showing 1 to 3 of 3 entries

Previous

1

Next

Updating Account Details (continued)

You can change your password, update your address, and update your phone number. This is only for basic information updates linked to the Supplier Portal.

Email *	myUNFI Enrollment Status	First Name *	Last Name *
<input type="text" value="jglaude@unfi.com"/>	<input type="text" value="false"/>	<input type="text" value="Jessica"/>	<input type="text" value="Glaude"/>
Phone Number	Mobile Number	Fax Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address 1	Address 2		
<input type="text"/>	<input type="text"/>		
City	State/Province	Postal Code	Country
<input type="text"/>	<input type="text" value="Select an Option"/>	<input type="text"/>	<input type="text" value="United States"/>
Company			
<input type="text" value="Search for..."/>			
Global Role			
<input type="text" value="Supplier"/>			

Thank You.