



Supplier Portal User Guide: Manager



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 Manager,” through the Supplier/User section and Dashboard of the portal.

Supplier Portal Manager

The Supplier Portal Manager can:

- Set-up users
 - Able to add new product packets
 - Run reporting if CV/SIS
 - Add a monthly special promotion
- Set-up 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: Manager

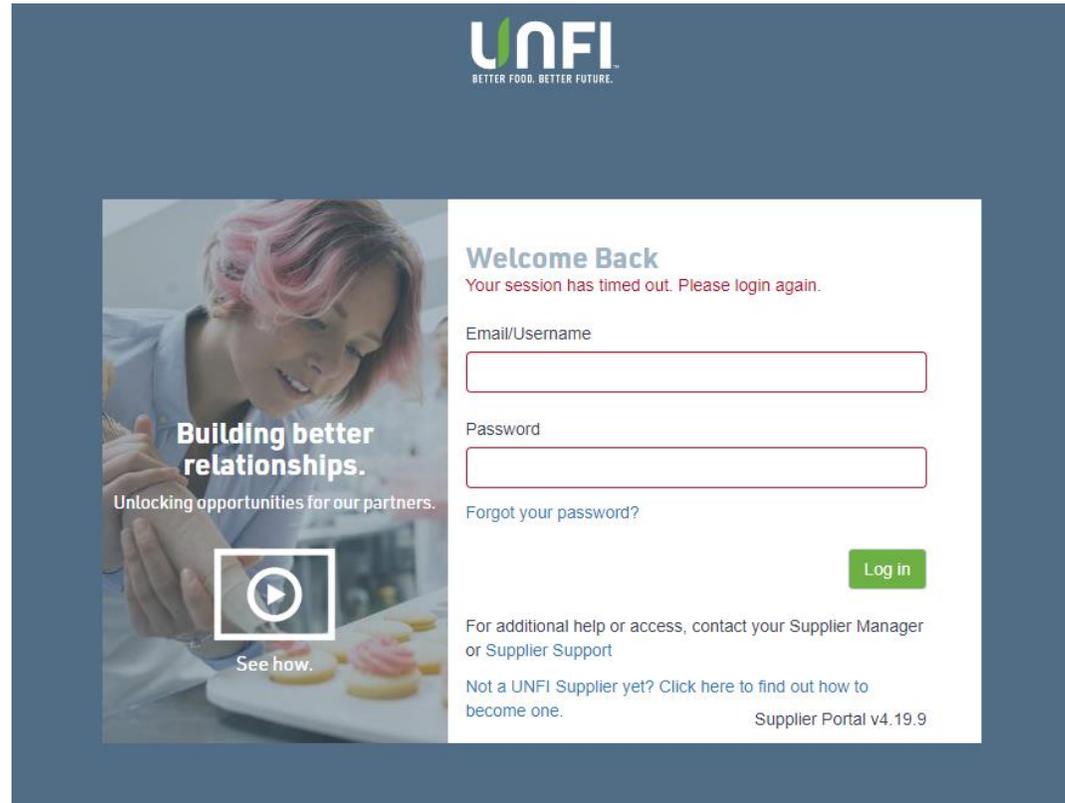
- 01 Login/Reset Password
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- 04 Editing/Removing Existing Users
- 05 My Account

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

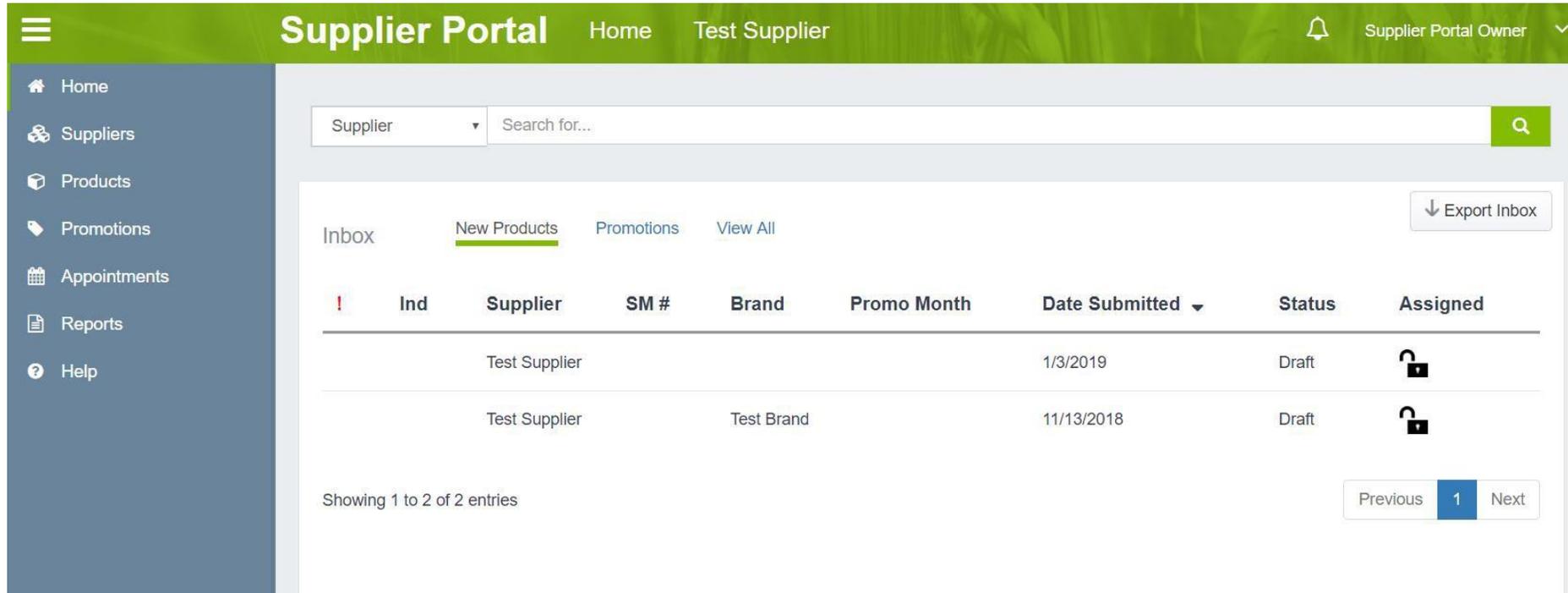
Home Page & Dashboard

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.



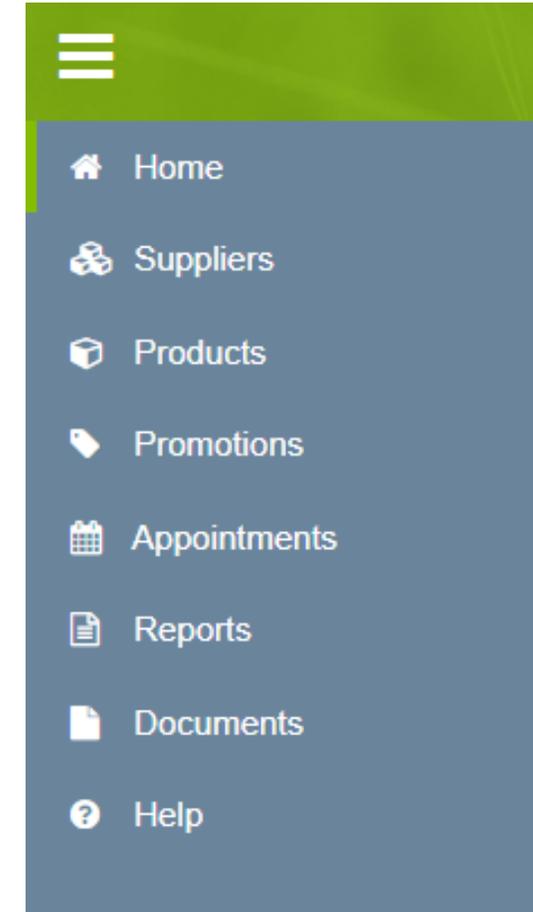
The screenshot displays the UNFI Supplier Portal interface. At the top, a green header bar contains the text "Supplier Portal" and navigation links for "Home" and "Test Supplier". On the right side of the header, there is a notification bell icon and the user's name "Supplier Portal Owner" with a dropdown arrow. A left-hand navigation menu is visible, listing options: Home, Suppliers, Products, Promotions, Appointments, Reports, and Help. The main content area features a search bar with a dropdown menu set to "Supplier" and a search 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 corner of the main content area. The central part of the page contains a table with the following columns: Ind, Supplier, SM #, Brand, Promo Month, Date Submitted, Status, and Assigned. The table lists two entries, both with a status of "Draft". The first entry has a date of 1/3/2019, and the second entry has a date of 11/13/2018. At the bottom of the table, it indicates "Showing 1 to 2 of 2 entries" and includes "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 Managers or Users

03

Accessing All Users

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

- Step 1: Once you've logged in as the Supplier Manager, 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 shows the UNFI portal interface. On the left is a navigation sidebar with the following items: Home, Suppliers (highlighted), Products, Promotions, Appointments, Reports, Documents, and Help. The main content area features a search bar at the top with the placeholder text "Search by supplier name or remit number" and a search icon. Below the search bar are tabs for "All Suppliers", "Active" (underlined), and "Inactive". An "Export Suppliers" button is located in the top right corner of the main area. A table displays the list of suppliers with the following columns: "Current Supplier", "Supplier Name", "Remit No.", "SM", and "Reporting Access". The table contains one entry: a radio button selected under "Current Supplier", "Test Supplier" under "Supplier Name", "900003" under "Remit No.", and "None" under "Reporting Access". At the bottom left of the table area, it says "Showing 1 to 1 of 1 entries". At the bottom right, there are navigation buttons: "Previous", "1" (highlighted), and "Next".

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.

The screenshot displays the UNFI user management interface. On the left, a dark blue sidebar contains navigation links: Home, Suppliers, Products, Promotions, Appointments, Reports, Documents, and Help. The middle section features a light gray sidebar with icons and labels: Company Info, Associated Users (highlighted in yellow), Manage Contacts, and Supplier Warehouses. The main content area is titled 'Users' and contains a table with the following data:

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

Below the table, it indicates 'Showing 1 to 3 of 3 entries' and includes pagination controls: 'Previous', '1' (selected), and 'Next'. An orange button labeled '+ Add (New or Existing)' is highlighted with a yellow box in the top right corner of the main content area.

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"/>	Select an Option ▼	<input type="text"/>	United States x ▼
Company			
<input type="text" value="Search for..."/>			
Global Role			
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 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	Supplier Owner x	Sales x	<input checked="" type="radio"/>	Select a... v Export Products d

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 options: Home, Suppliers, Products, Promotions, Appointments, Reports, Documents, and Help. The main content area has a sub-menu with 'Company Info', 'Associated Users' (selected), 'Manage Contacts', and 'Supplier Warehouses'. The 'Users' section features a table with columns for Name, Email, and Role, and a '+ Add (New or Existing)' button. The table lists three users: Jessica Glaude (Supplier Owner), Supplier Portal Owner (Supplier Manager), and UNFI Testing (Supplier Owner). Each user has an 'x remove' button next to their name. At the bottom, it shows 'Showing 1 to 3 of 3 entries' and a pagination control with 'Previous', '1', and 'Next' buttons.

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

Update Existing Users

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

Email *	myUNFI Enrollment Status	First Name *	Last Name *
<input type="text" value="supplierportalowner@gmail.com"/>	<input type="text" value="false"/>	<input type="text" value="Supplier Portal"/>	<input type="text" value="Owner"/>
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"/>			

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"/>	None ▾	Export Products 📄

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.”

The screenshot displays the UNFI Supplier Portal interface. At the top, there is a green navigation bar with "Supplier Portal", "Home", and "Test Supplier" links. On the right, a user profile for "Jessica Glaude" is shown with a dropdown menu containing "My Account" and "Log out". Below the navigation bar, there is a search bar with a "Supplier" dropdown and a "Search for..." input field. The main content area features a tabbed interface with "Inbox", "New Products", "Promotions", and "View All" tabs. The "New Products" tab is active. To the right of the tabs are two buttons: "7 Simple Steps" and "Export Inbox". Below the tabs is a table with the following columns: Ind, ID, Supplier, SM #, Brand, # Items, Promo Month, Date Submitted, Status, and Assigned to. The table contains three rows of data, all with a status of "Draft".

!	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.