

JOURNEY TO PROCUREMENT EXCELLENCE

Updating Bank Account Details

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In this course you will learn how to Update Bank Account Data in iSupplier.

iSupplier Portal ~ Vendor Training





Step 1

From the login page, click in the **User Name** field and enter the User Name provided during the registration process.





Step 2

Click in the **Password** field and enter the password you created during the registration process.





Step 3

Click the Login button.



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Step 4

Click the **DeKalb County Supplier Collaboration** link.



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Step 5

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Step 6

Click the Admin tab.





Step 7

Click the **Banking Details** hyperlink.



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Step 8

In this example we will **End Date** your current account and **Create** a New Account.

Click on the **Calendar** icon to open the Pick a Date window.



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Step 9

By default the system will highlight the current date as your end date. Click on the **date** to proceed.



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Step 10

The system will return to the Banking Details page. Click the **Create** button.



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Step 11

Click on **the Information (i) bubble** to read tip on using a New or Existing Bank.





Step 12

After reading the Tip, Click the **OK** button.



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Step 13

In this example, we will follow the suggestion in the tip and search for our bank by clicking on the **Existing Bank** option.





Step 14

Click the **Search for Bank Name** button.



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Step 15

Click in the **Search By** field.



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Step 16

Enter the desired information into the **Search By** field. Enter "**bank of america**".



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Step 17

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Step 18

Click the **Select** button.





Step 19

Click on **the Information (i) bubble** to read tip on using a New or Existing Branch.





Step 20

After reading the Tip, Click the **OK** button.





Step 21

In this example, we will follow the suggestion in the tip and search for our branch by clicking the **Existing Branch** option.



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Step 22

Click the **Search for Branch Name** button.





Step 23

To retrieve all branches for the bank selected, click the **Go** button. You can also search by the Branch Name, Number and other fields.



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Step 24

Locate and select the correct branch by clicking on the **Select** button.



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Step 25

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Step 26

Click in the Account Number field.



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Step 27

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Step 29

Add any additional information you would like DeKalb County to know about your bank. Click on the **Save** button when you are finished.



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You have just finished Updating Bank Account Details for your company on the DeKalb County iSupplier Portal. Your changes will be routed to DeKalb County for approval and will not be available for transactional purposes until the changes have been approved.

Click on the **Home** hyperlink to return to the iSupplier Portal Home Page.