Markel Supplier Portal Quick Reference Guide

The Markel Supplier Portal is a secure and seamless platform which enables you to:

- Submit an invoice for payment processing.
- Check the status of a purchase order, invoice or payment.
- View and update your company's profile information, including banking information and contacts.
- Provide improved channels of communication.

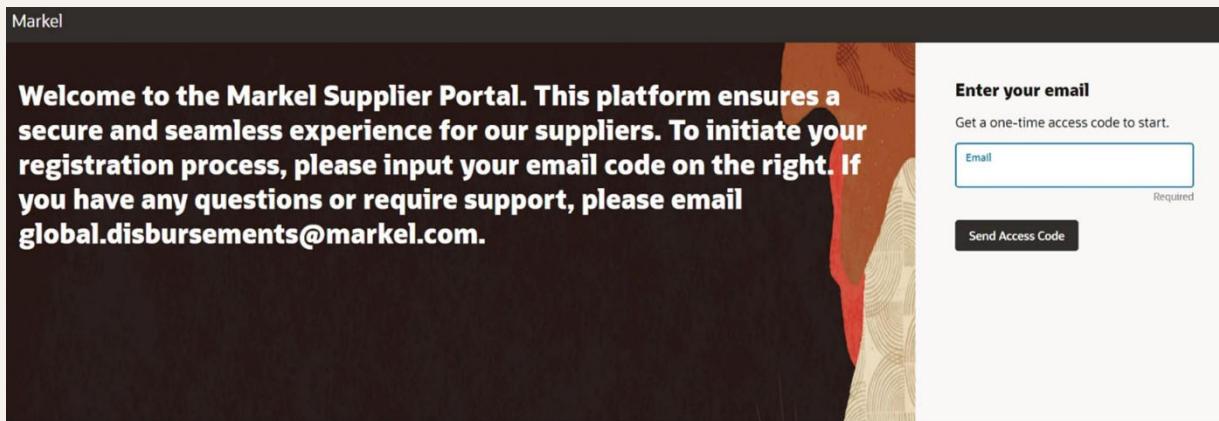If you have any questions or require support, please email Global Disbursements:
E: global.disbursements@markel.com
T: +1 804 955 1950.

**MARKEL**

Accessing the Supplier Portal

1. Once you have received the "Welcome to Markel" email from global.disbursements@markel.com, click on the link to the portal. If you have not received a "Welcome to Markel" please contact Global Disbursements.

2. Enter your email address in the **Email field** and click **Send Access Code**.

3. Please check your Inbox for an email from "exmx-prod.fa.sender@workflow.email.us-ashburn-1.ocs.oraclecloud.com". If you don't receive an email within 15 minutes, please check your Junk folder.
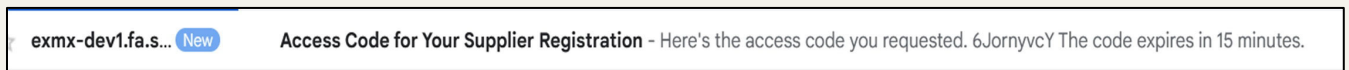
4. Once you have received the email, copy the access code from the email.
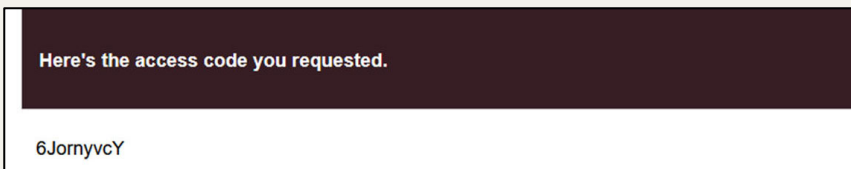
5. Paste the access code into the **Access Code field** and click **Continue**.
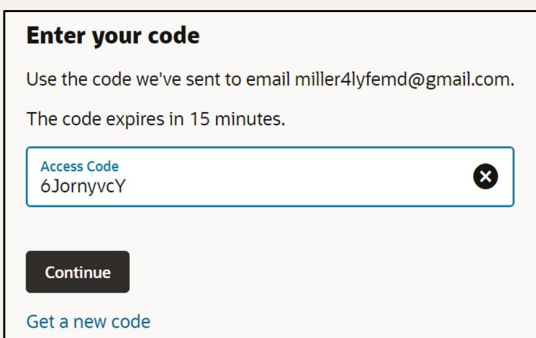
6. Once you have access to the Supplier Portal you will now need to complete the next five sections (Company Details, Contacts, Addresses, Bank Accounts and the Questionnaire). Please save your inputs regularly as the site will time out and you could lose your information.

Company Details

Company Details

Company	Website	Country ▼
Required		Required
Taxpayer ID	Tax Registration Number	D-U-N-S Number
Organization Type ▼	Supplier Type ▼	
Required		

Note to Approver

Attach tax, insurance, and other relevant documents

Drag and Drop
Select or drop files here.

| URL | Add URL |

No items to display.

Cancel   Save   Continue

1. **Country:** If you start to type the name of the country, this will help populate this field quickly.

2. **Organisation Type:** Any reference to "Foreign" equates to non-United States, so please use the categories prefixed with Foreign if you are outside of the United States.

3. **Supplier Type:** The majority of organisations providing services to Markel will be classified as "Goods/Services – Trade Supplier, unless you provide specific services such as Legal, Rent & Utilities.

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Contacts

Contacts

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name	Last Name	Job Title
Required	Required	

Email
miller4lyfemd@gmail.com

Country US ▼	Mobile +1	

Country US ▼	Phone +1	Ext

Country US ▼	Fax +1	

Is this an administrative contact?
Administrative contact will receive general communications from us.   ◉ Yes   ○ No

Does this contact need a user account?
User accounts will provide online access to supplier transactions and self-service tasks.   ◉ Yes   ○ No

What user roles does this contact need?
Assign at least 1 user role to specify the responsibilities of the contact.

☑ Markel Supplier Portal

➕ **Add Another Contact**

1. Once you have completed all the fields, please ensure you select if the contact **"Is an administrative contact?"** and/or **"Does this contact need a user account?"** as this determines the role a contact can perform.

2. Once you have added your contact details, you can click **"Add Another Contact"** which will enable you to add additional associates from your organisation to utilize and access the supplier portal (you are able to add as many as you wish).

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Addresses

Addresses

Enter at least one address.

Address 1

Address Name
Required

What's this address used for? Select at least 1 purpose.

☐ Receive Purchase Orders   ☐ Receive Payments   ☐ Bid on RFQs

Country/Region
United States ▼

Address Line 1   Address Line 2   City ▼ *Required*

State ▼ *Required*   Postal Code

Email   Country US ▼   Phone   Ext

Country US ▼   Fax

Which contacts are associated to this address?

☐   LaKecia Miller   LaKecia.Miller@Markel.com

➕ Add Another Address

Last updated 7 minutes ago   Cancel   Save   Continue

1. You can add multiple addresses associated with your organisation, however, all your addresses must have an email associated with them (as this is how we distribute purchase orders).

2. You can opt for all your addresses to **"Receive Purchase Orders"** and **"Receive Payments"** but you must have at least one address to "Receive Purchase Orders" and one address to "Receive Payments" (if you have to separate these two requirements).

3. Please remember to leave **"Bid on RFQs"** unticked.

4. Before continuing to the next section, please tick the contact(s) you want associated with the address.

5. Click **"Add Another Address"** to add additional addresses for your organisation.

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Bank Accounts

Bank Accounts

Bank account 1   🗑

Country
Canada ▾

| Branch Transit Number ▾ | Bank ▾ | Branch ▾ |
| Required | | |

| Account Number | Currency ▾ | Account Type ▾ |
| Required | | |

Account Holder Name

+ Add Another Bank Account

1. You can add multiple bank accounts associated with your organization.

2. Please complete all fields for the pertinent country. Required fields are subject to change based on the country selected.

3. **Currency:** You can start to type the currency to more quickly populate this field.

4. **Account Type:** Please note a **Checking** account equates to a current or payment account.

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Questionnaire

Questionnaire

Markel Qualification Area ◔

Markel Qualification Area ◔ (Section 1 of 1)

1. Are you a U.S. based supplier?

💡 Select the correct value and attach the appropriate form.

Required

○ a. Yes, please attach a W-9.

○ b. Not a U.S. based supplier but are providing services in the U.S, please attach a W-8.

○ c. Not a U.S. based supplier and not providing services in the U.S.

2. Please provide the name of your key contact at Markel.

Required

[   ]

3. Please attach a copy of your invoice for verification of your billing information.

💡 Please select below to attach copy of your invoice

Required

○ a. Please select below to attach copy of your invoice

Last updated 15 seconds ago   Cancel   Save   **Submit**

1. Once you have answered the 12 questions in the Questionnaire, click **Submit**.

Your registration request 11001 was submitted.

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