

# IMS Service PROvider Portal Company Profile Instructions



## Overview

Lowe's IMS Service PROvider Portal (IMS Portal) allows Independent Service PROviders to use the **Company Profile** feature to enter company insurance and license information, store and category coverage list, labor pricing information and subcontractor information (licenses and certifications for subcontractor companies and their team members), as well as contact information (primary and additional contacts).

It's important to enter your company's main **contact information** in the IMS Portal and keep it current, using these steps:

- In the IMS Portal, in the top right, click **Installer Support** > click **Profile**.
- Enter your information.
- To opt in for marketing messages (which allows Lowe's to send you **info about promotions & discounts**) check the box "Enroll to Lowe's PROvider marketing news, offers and more via email."
- Click **Save**.

To view your full Company Profile, from the IMS Portal home screen, click **Company Profile** > select **Company Profile**. The Company Profile includes multiple tabs:

- **Profile:** Manage your phone numbers and email address. If you do not subcontract work to other companies, click **No Subcontractors**.
- **Additional Contacts:** Add multiple personnel beyond your main email or phone number. This enables Lowe's to send information to the **appropriate contact within your company**. **For instructions, see the Additional Contacts section below.**
- **Insurance:** Shows your insurance policies (in Progress for approval/renewal, Active, Inactive). To add a new policy, click **Submit Insurance** > enter information and upload files > click **Submit**.
- **License:** Shows licenses (In Progress for approval/renewal, Active, Inactive).
- **Stores & Categories:** Assigned to your business to perform installations. To view supported stores, click the blue arrow.
- **Capacity:** Categories you service. To modify, click the blue arrow > **Edit** > enter Weekly Capacity > **Submit**.
- **Warehouses:** Your warehouse information (if applicable). To modify, click the blue arrow. **Note:** Changes are effective immediately. **Do not** add a warehouse until it is ready to receive product. If a warehouse is made inactive, all assigned stores will be removed.
- **Classification:** You can identify your company as a **diversity-owned business**. **To do so, see Instructions: Classification below.**
- **Labor Pricing:** Enter a store number you support, then select a category.

## Instructions: Subcontractors

For every subcontractor (companies and their team members), you are required to add licenses, registrations and certifications - along with a copy of the document. To do so, follow the steps in the [IMS Service PROvider Portal Resource Guide](#) under **Team Member Management** (located in the IMS Portal > Resource Center > Administrative > in Description, enter Portal).

## Instructions: Additional Contacts

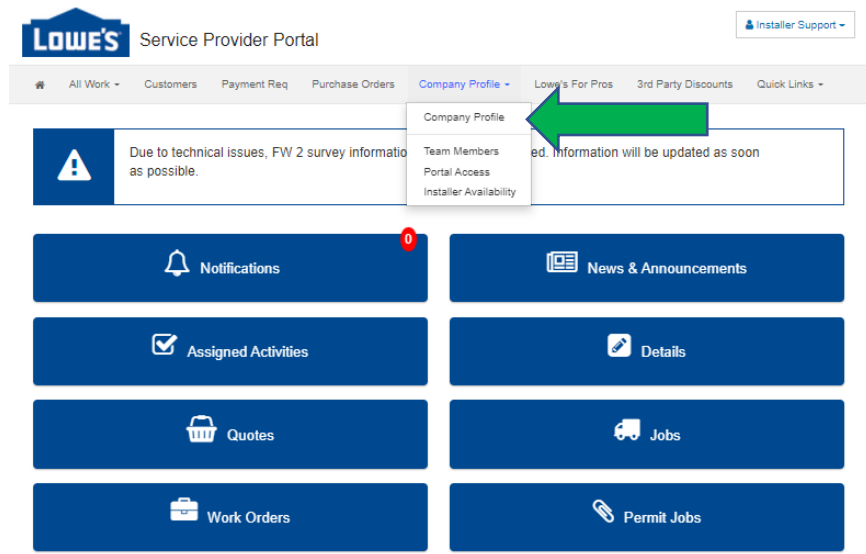
People who are assigned the Admin role have access to update contact information. If you don't have access, contact your company's office staff.

The IMS Portal includes the following contact types:

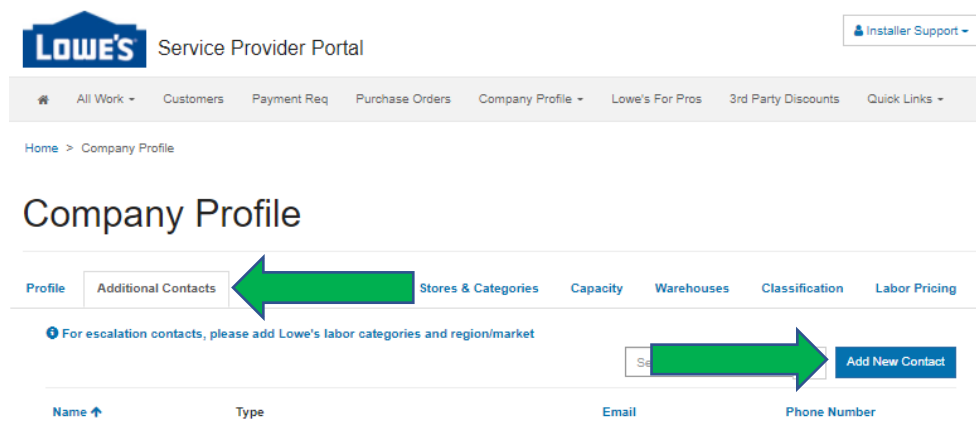
- Installation Escalation (**Note:** For this type, also assign labor category, Region and District)
- Compliance (EPA certifications, licensing, insurance and background information)
- Technical (IMS Portal and API access notifications)
- Communications (PROvider monthly newsletter and email notifications)
- Debits (account or payment-related notifications)

**To enter or update additional contacts for your company, follow these steps:**

To view your profile, from the IMS Portal home page, click **Company Profile** > select **Company Profile**.



To add a new contact, click the **Additional Contacts** tab. Click **Add New Contact**.



In Type, select a type. **Note:** Multiple types can be selected, except for Installation Escalation. Fill out the information. Click **Submit**.

Create ✕

**For escalation contacts, please add Lowe's labor categories and region/market after adding the contact.**

Contact Information

Type \*

Select or search options

Name \*

Email

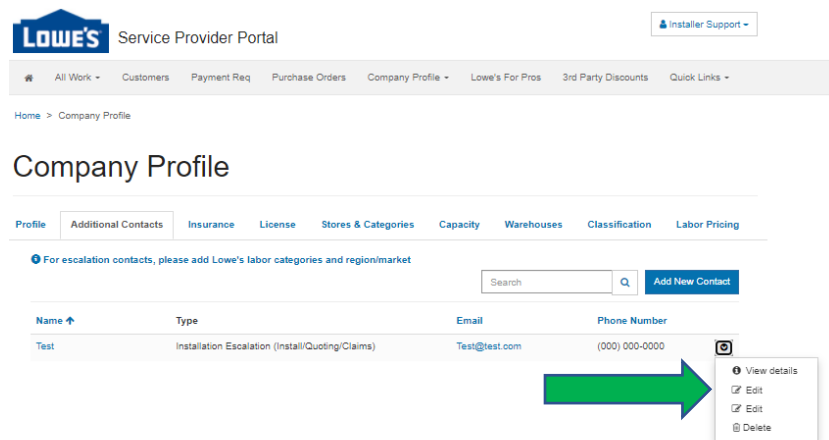
Phone Number

Provide a telephone number

Submit

**Important:** If you select the **Installation Escalation Type**, you also need to assign the contact their appropriate **labor category, Region and District**. To do that, follow these two additional steps:

On the **Additional Contacts** tab, at the end of a record, click the drop-down icon > select **Edit**.



Service Provider Portal

Installer Support

All Work Customers Payment Req Purchase Orders Company Profile Lowe's For Pros 3rd Party Discounts Quick Links


Home > Company Profile

## Company Profile

Profile Additional Contacts Insurance License Stores & Categories Capacity Warehouses Classification Labor Pricing

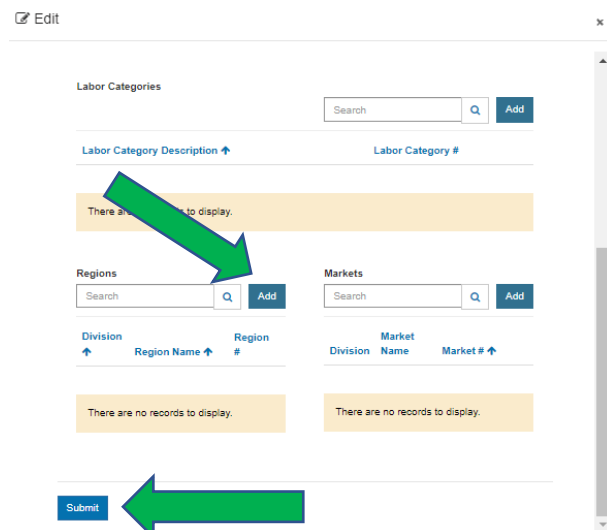
For escalation contacts, please add Lowe's labor categories and region/market

Search Add New Contact

Name	Type	Email	Phone Number	
Test	Installation Escalation (Install/Quoting/Claims)	Test@test.com	(000) 000-0000	

- View details
- Edit
- Edit
- Delete

Scroll down. Click **Add** to add preferred Labor Categories, Region and Market data coverage for that contact. Click **Submit**.



Edit

Labor Categories

Search Add

Labor Category Description Labor Category #

There are no records to display.

Regions

Search Add

Markets

Search Add

Division	Region Name	Region #
There are no records to display.		

Division	Market Name	Market #
There are no records to display.		

Submit

## Instructions: Classification

To identify your company as a diversity-owned business, follow these steps:

From the IMS Portal home page, click **Company Profile** > select **Company Profile**. To add your business classification, click the **Classification** tab. Click **New**.



Home > Company Profile

## Company Profile

Profile Additional Contacts Insurance License Stores & Categories Capacity Warehouses Classification Labor Pricing

New

Classification Type Certifying Agency Expiration Date

There are no records to display.

In **Classification Type**, select the appropriate type. Fill out the information. Click **Save & Close**.

Create

x

### General

Classification Type \*

Certificate # \*

Certifying Agency \*

Expiration Date \*

#### Record History

Created On

—

Created By

—

Modified On

—

Modified By

—

Save & Close